



**eScholar.**  
Bringing Data Together

# DirectMatch Training

For End Users

Presented by:  
Elaine Rulla

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Good Morning. Welcome to the Louisiana Dept of Education DirectMatch Webinar hosted by LDOE and eScholar.

My name is Elaine Rulla and I will be your host for the presentation.

From LDOE, ***we have a large group of participants.*** *We are also happy to have such a large group of participants from across Louisiana today. This is great!*

Our goal this morning is to introduce you to the DirectMatch v. 2020 system. We will be recording today's webinar in case others are interested in viewing this session. After the webinar, you will receive a copy of today's presentation along with my commentary. In addition, once the questions have been answered, you will receive a written copy of the Q&A.

I see we are about ready to get started. Just a few logistics before we begin: You are currently muted. If you wish to ask a question, please type it in the Q&A box. Take a moment and locate the Q&A box on your device. Since we have such a large group attending today, we likely will answer most questions in a follow-up email post webinar. Also, during the webinar, I will periodically ask you to respond to Poll questions. Your answers are anonymous. You will be able to answer the questions by clicking directly on your computer screen or your device.

Ok. Let's get started. (To slide deck....)



AND



eScholar

The DirectMatch training is a Louisiana Department of Education initiative designed to orient users to the DirectMatch solution by eScholar.

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The DirectMatch training is a Louisiana Department of Education initiative designed to orient users to the DirectMatch solution by eScholar.

# Agenda

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## ■ Solution Overview

- Key Concepts

## ■ Match Options

- Person and Address

## ■ The Matching Process

- Overview and Details

## ■ CEP Manager

- For CEP Managers

## ■ The DirectMatch System

- Match and Download

## ■ System Features and Wrap Up

- Student Search and Summary

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Today we will cover the solution overview, the matching process, match and download, CEP Manager features, system tools as well as system features and wrap up.

## **Objectives**

At the end of today's training, participants will be able to describe:

- ✓ The matching logic used in the DirectMatch System.
- ✓ How to make a good match decision.
- ✓ The process for downloading Match Records.

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- ✓The matching logic used in the DirectMatch System
- ✓How to make a good match decision
- ✓The process for downloading Match Records





# Solution Overview

Let's look at the solution overview.

# DirectMatch Benefits

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## ■ DirectMatch provides:

- ✓ A powerful matching engine
- ✓ A tracking and logging process for submission data
- ✓ An easy-to-use interface
- ✓ An organized and structured approach
- ✓ Secure and role-based access

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## DirectMatch provides:

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- ✓ An organized and structured approach
- ✓ Secure and role-based access

# Key Concepts



## Master Index

eScholar Uniq-ID® Person ID has a Master Index, which is the individual unique identities for each person in the application. For example, each student is assigned a unique identifier and is in the Master Index.

## Program Index

Each program that is available in DirectMatch has a Program Index, which is the individual records associated to the program. For example, the SNAP Index consists of all the SNAP records provided by USDA.



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The concept of the master index and program index is important to the DirectMatch system.

The Master Index is the eScholar Uniq-ID Person index which contains unique identities for each individual in the system.

The Program Index contains data from programs such as SNAP, TANF, Foster or Medicaid. These are used as sources to match against in the DirectMatch system.

# Key Concepts



## Batches

A group of input records submitted to the system at the same time which are stored as a group and can be referred to by Batch Number.

## Transactions

Individual records within a batch. Individual transactions may be accessed before an entire batch is finished processing.



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Batch – A group of input records submitted to the system at the same time which are stored as a group and can be referred back to by Batch Number.

Transactions - Individual records within a batch. Individual transactions may be accessed before an entire batch is finished processing.

# Key Concepts

## Match Decision

Each time a match request is performed with the Master Index and the Program Index, a Match Decision is produced to indicate if the records match. The available decisions are Match, No Match and Near Match.



## Match

When a match request is performed, a Match is returned when the match candidate record has a match score above the Upper Near Match Threshold. A Match decision links the records together.

## Near Match

When a match request is performed, a Near Match is returned when the match candidate record has a match score between the Lower Near Match and the Upper Near Match Threshold. A user must review and resolve the record.

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**Match Decision** – Each time a match request is performed with the Master Index and the Program Index, a Match Decision is produced to indicate if the records match. The available decisions are Match, No Match and Near Match.

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All data displayed throughout this presentation and in the supporting resources is not real data.

# The Matching Process

The Matching Process

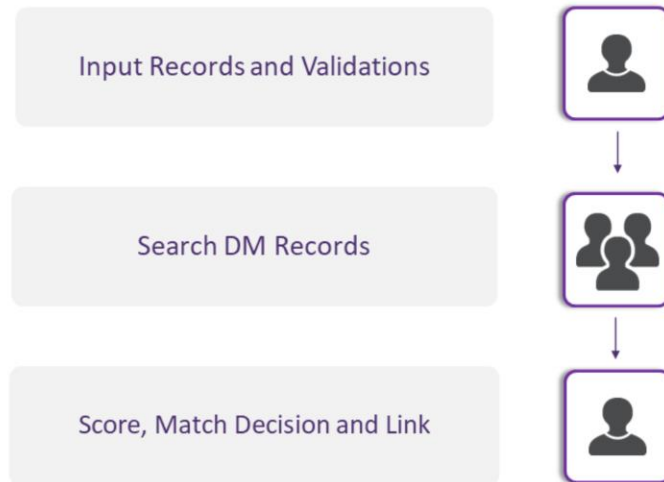


## Matching Process Overview

Let's take a look at the overview of the matching process.



# Matching Process Overview

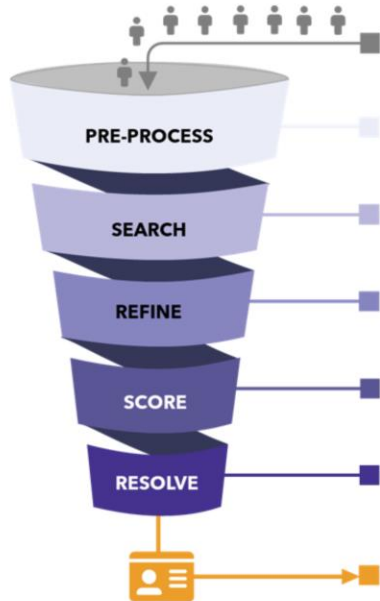


First, records are submitted to the system. We will refer to these records as 'Input Records' in this presentation.

Next, the Matching engine develops an index of DirectMatch records.

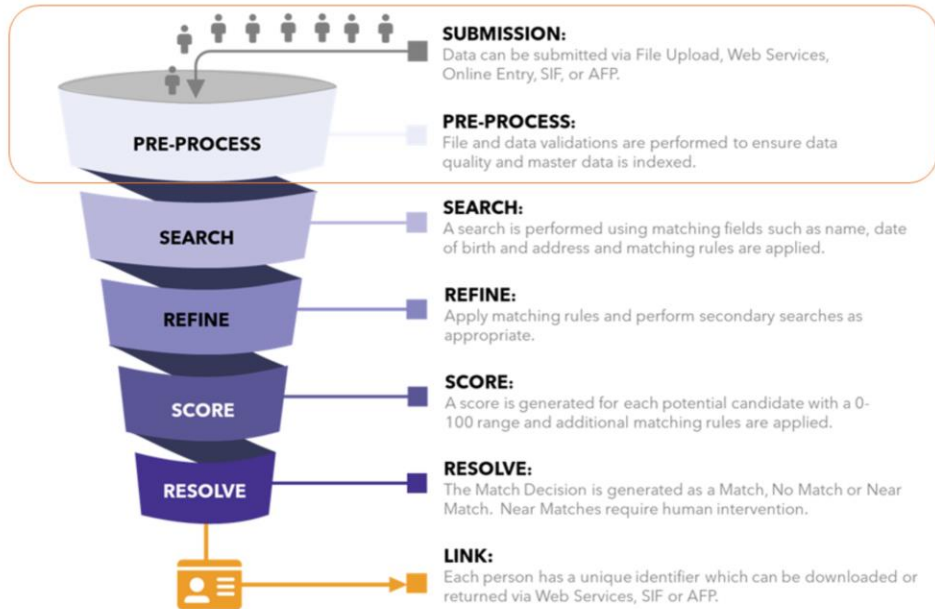
The Matching engine compares the records and provides a match decision.

# Proven Matching Process



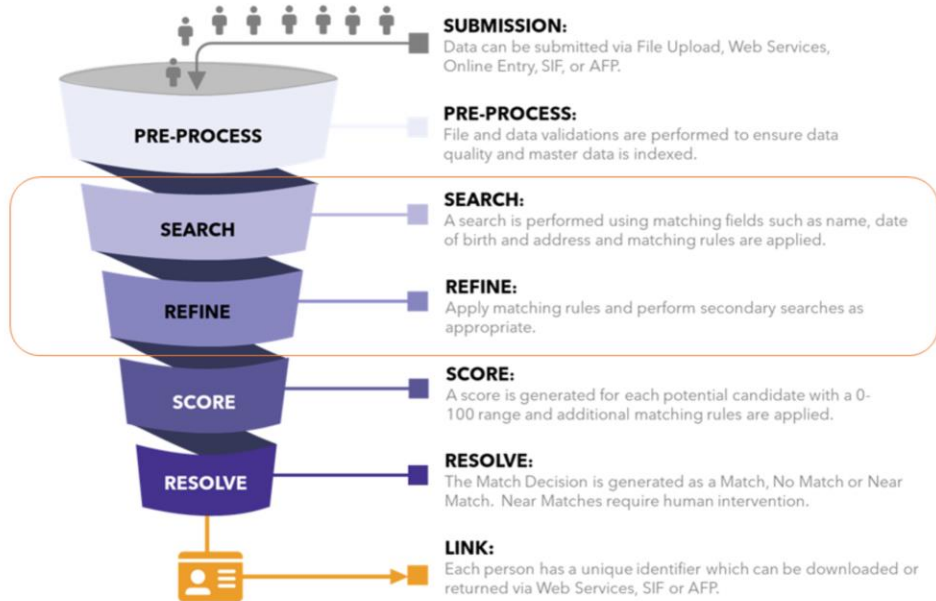
This graphic is a representation of the steps the DirectMatch system uses to determine the eligibility of students to the various programs such as SNAP, TANF, Foster, Medicaid or other programs.

# Proven Matching Process



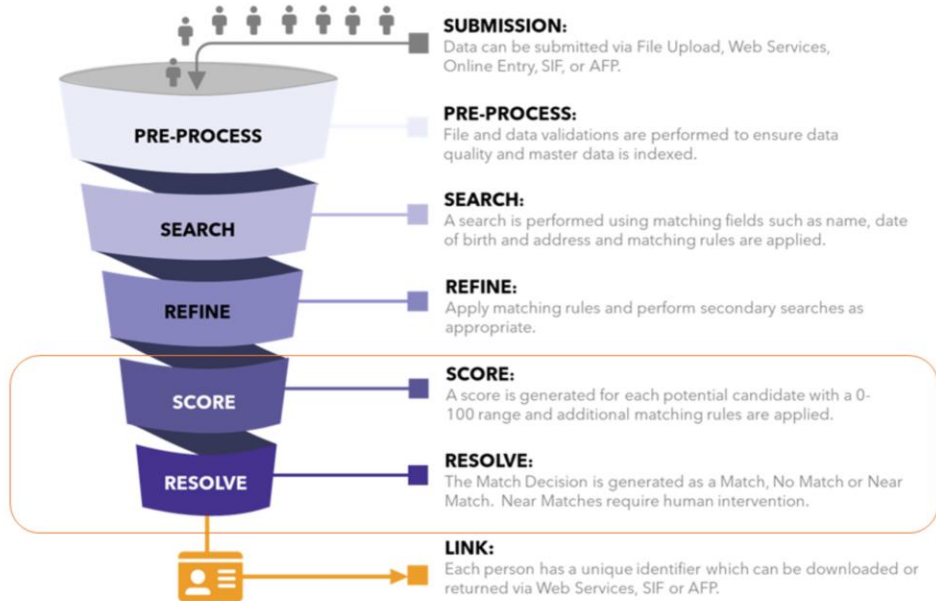
First, records are submitted to the system in an input file called a batch. The input file or batch goes through a validation process to be sure the records meet the required format.

# Proven Matching Process



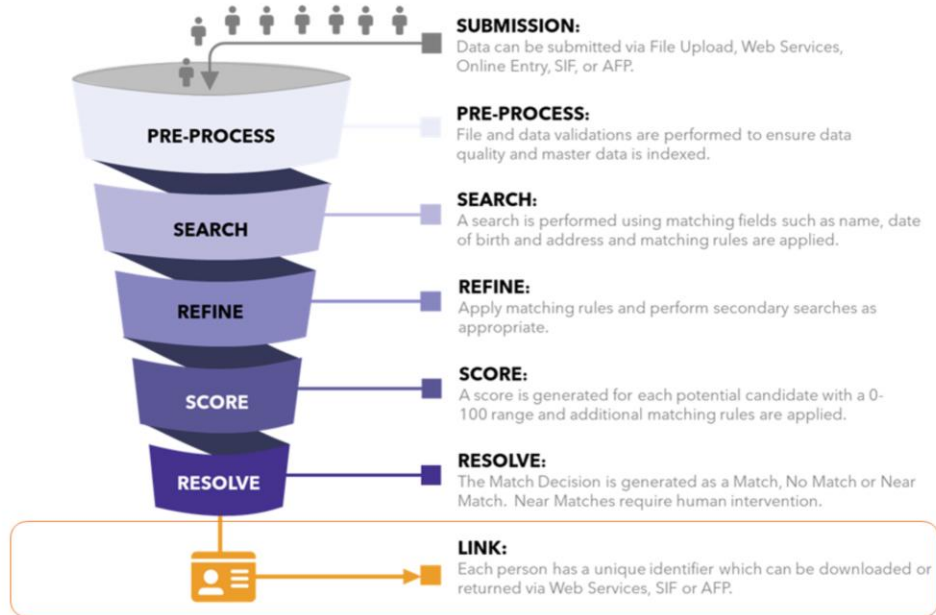
Next, the system searches the program index and applies any matching rules that have been set by the state system administrator.

# Proven Matching Process



The DirectMatch system generates a score and compares the score to the matching thresholds to determine if each record is a Match, No Match or Near Match. No Match records require no further action. Near Match records require human intervention. We will discuss that process in depth later in this training.

# Proven Matching Process



All Matched records will be linked to the appropriate program record, and they can be downloaded from the system. The file can then be uploaded into the source system.

# Matching Outcomes

Three possible outcomes



**Match**



**Near Match**



**No Match**

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In the “DirectMatch” process there are 3 possible outcomes as shown here:  
Match, No Match and Near Match.

# Matching Outcome Frequency

Three possible outcomes



## Match

Most Common



## Near Match

Less than 2%



## No Match

Most Common

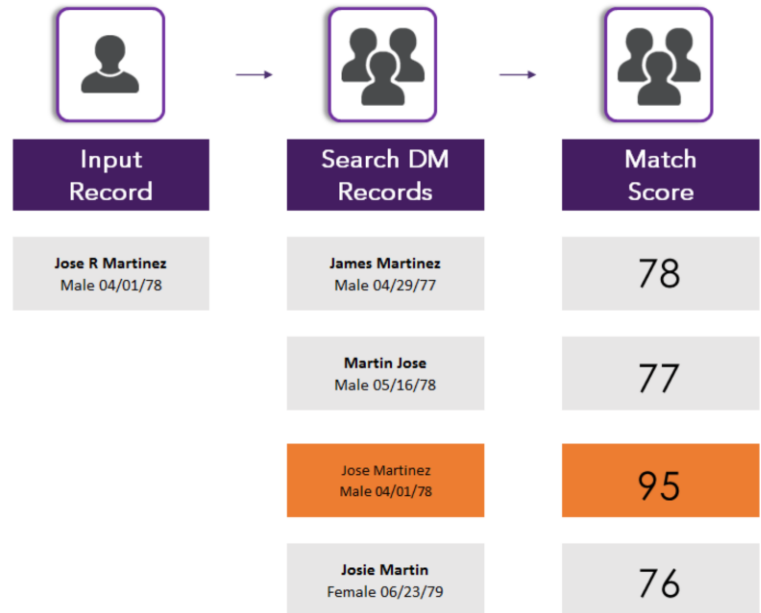
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Match and No Match results are the most common occurrence. The Near Match result generally occurs in less than 2% of the matching cases. The near match records require human intervention to resolve. More about that later.



## Matching Process

The Input Record, Jose R. Martinez, is submitted to the system either as part of a batch or online entry.



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Let's look at an example of a record going through the matching process.

Student Jose R. Martinez is submitted to the system.

The matching engine develops from the master records a candidate record index containing all the records that the matching engine thinks might match the input record.

The matching engine logic accounts for spelling errors, nicknames, etc.

Then the matching engine compares the input record, to each record in the DirectMatch system and assigns a match score for each comparison.

Here you can see the match score results when comparing the input record to the DirectMatch system.

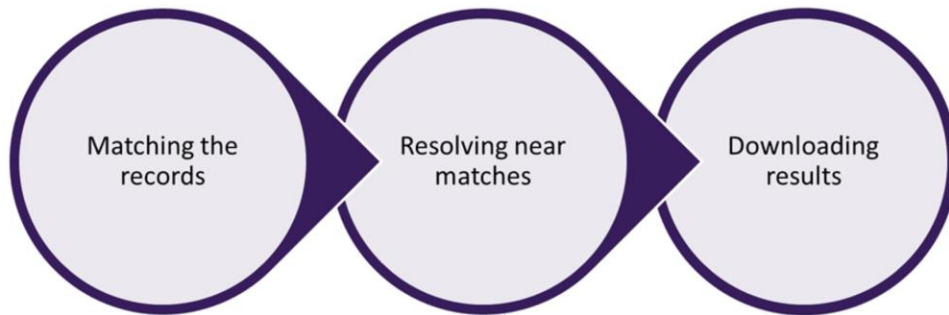
The match score is used to determine if the input record is a match, a near match or no match to any of the DirectMatch records. When making this decision the matching engine takes into account the thresholds that have been configured.

In this example, we can see that Jose R. Martinez and Jose Martinez share a match on the first name, last name, as well as gender and birthdate. He therefore received the matching score of 95. This record is considered a match and Jose will be linked to the program record.



## Matching Process Details

The Matching Process Details

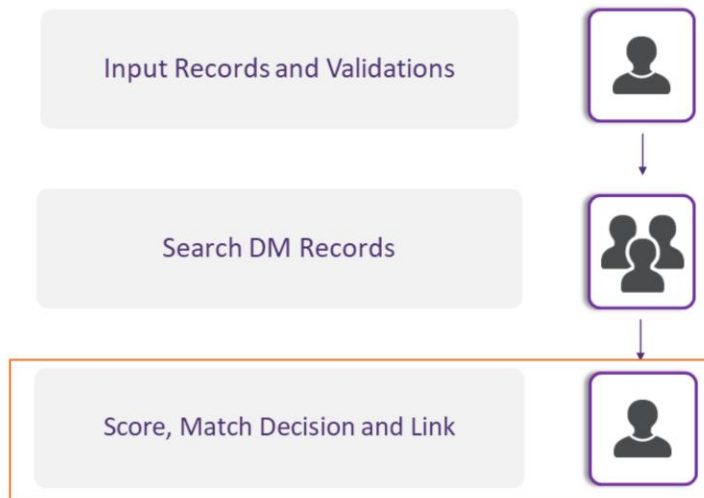


The DirectMatch Process for the end user.

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The DirectMatch Process for the end user includes matching the records, resolving near matches and downloading the results.

# Matching Process Overview



First, records are submitted to the system . We will refer to these records as ‘Input Records’ in this presentation.

Next, the Matching engine develops an index of DirectMatch records.

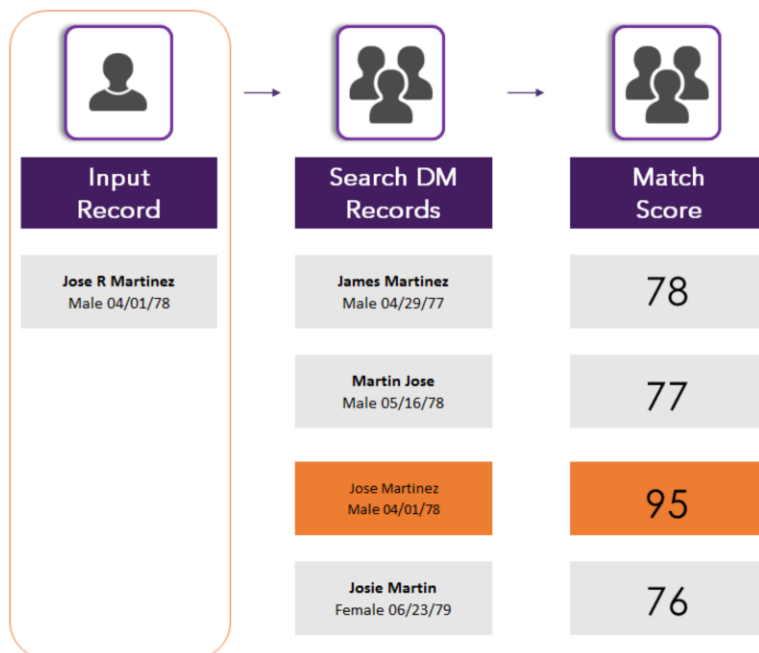
The Matching engine compares the records and provides a match decision.

In most cases the records will be submitted by the Secure ID users and the DirectMatch user will only work within the highlighted portion of the system.

Let’s look at an example.

## Matching Process

The Input Record, Jose R. Martinez, is submitted to the system either as part of a batch or online entry.

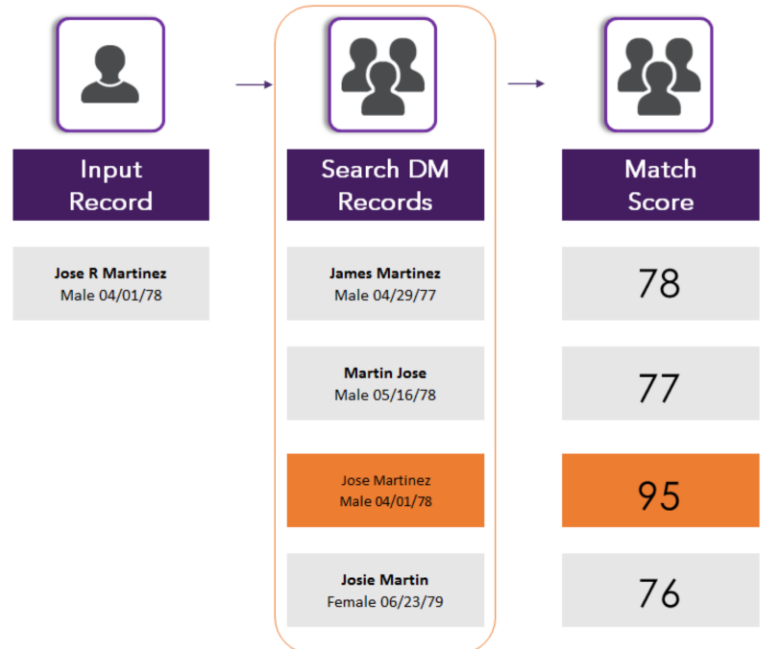


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The Input Record, Jose R. Martinez, is submitted to the system either as part of a batch, automatic file processing or an online entry.

## Matching Process

During the matching process the system searches the DirectMatch system for possible candidates that match the input record.



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During the matching process, the system searches the DirectMatch system for possible candidates that match the input record.

## Matching Engine

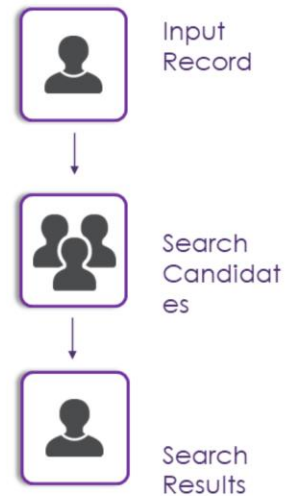
**Last Name:** High Weight, Required

**First Name:** High Weight, Required

**Middle Name:** High Weight

**Birth Date:** Medium Weight, Required

**Gender:** Low Weight, Required



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The Matching Engine uses the last name, first name, birth date and, gender for matching. The last name and first name have a high weight and are required. The middle name is a high weight if provided. The birthdate is a medium weight and gender is low weight. Both the birthdate and gender are required.

# Matching Engine Exceptions

## Exception Examples

**Errors in spelling:** Tomas instead of Thomas

**Nicknames:** Bill or William

**Mixed usage:** John Thomas or Thomas John

**Multi-part names:** Anderson-Lott or Lott

**Uncommon Names:** Leniency on misspellings

**Punctuation:** Removes punctuation

The matching engine employs over 300 different algorithms to catch different variations.

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The matching engine accounts for exceptions such as misspellings, nicknames, hyphenated names, etc.

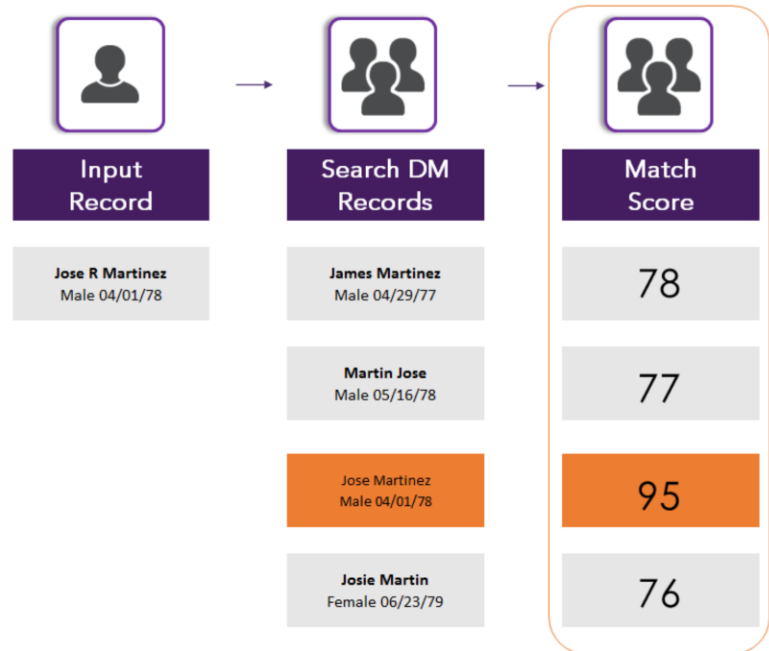
This only a partial list of the exceptions.

The Matching engine employs 300 different algorithms to catch different variations.



## Matching Process

Based upon the search results, the system generates a Match Score for each record. In this example, we can see that Jose Martinez is the closest match to the input record and is given a match score of 95.






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Based upon the search results, the system generates a Match Score for each record. In this example, we can see that Jose Martinez is the closest match to the input record and is given a match score of 95.

# Matching Thresholds: SNAP, TANF

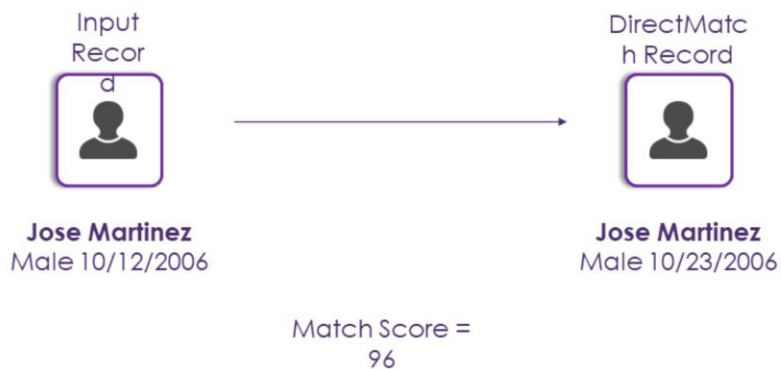
Match thresholds are configurable by program at the State level.

	<b>Match</b>	95-100
	<b>Near Match</b>	79-94
	<b>No Match</b>	0-78

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The Match decision is determined by comparing the match score to the thresholds. The thresholds can be configured by the State at the program level. This example shows the match thresholds for the SNAP and TANF programs. The match threshold is currently set at 95-100, near match is 79-94 and no match is 0-78. Other programs such as Medicaid and Foster may use different matching thresholds.

# Match



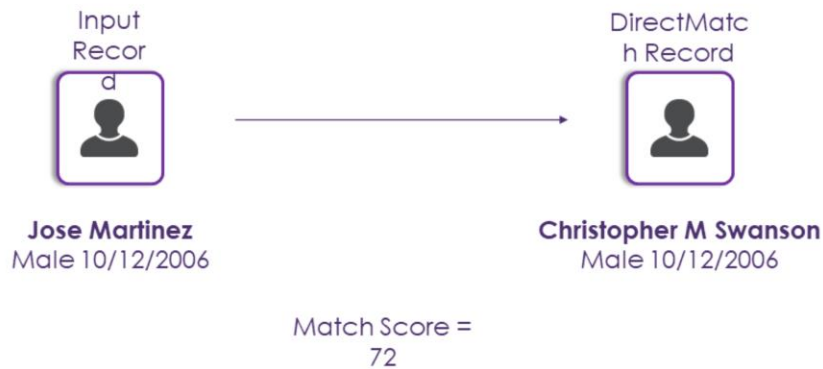
The input record is determined to be a match with one of the DirectMatch records.  
In this case the match score is 96 and the linked records number is assigned.  
There is no need to review these records.

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## Match Record.

The input record is determined to be a match with one of the DirectMatch records.  
In this case the match score is 96 and the linked records number is assigned.  
There is no need to review these records.

# No Match



If the system finds no matching student the record will be returned as 'No Match'.

These records do not need to be reviewed.

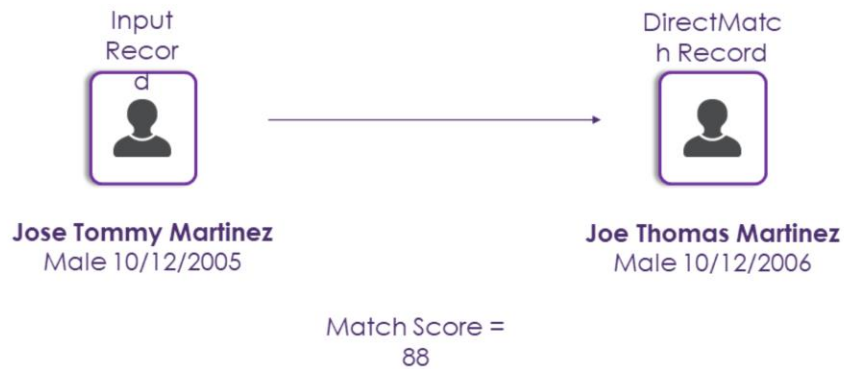
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No Match record.

If the system does not find a matching student, the record will be returned as 'No Match'.

These records do not need to be reviewed.

# Near Match



The DirectMatch system can not determine whether or not these students are the same.

Near matches require human intervention to resolve.

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Near Match record.

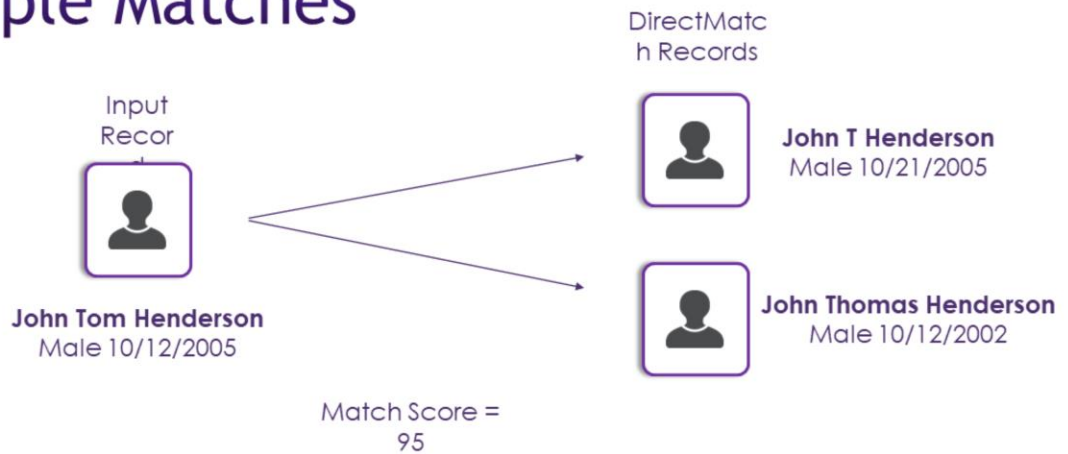
In this example names are close but not exact.

The Birthdates are close.

The Match score flags this as a near match.

Since the DirectMatch system can not determine if these students are the same person, this decision will require human intervention to resolve.

# Multiple Matches



If two or more potential matches are found above the matching threshold, the system forces a near match. The near match will require human intervention to resolve.

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## Multiple Matches

In this example we see that John Tom Henderson has two potential matches in the DirectMatch system. Since both matches are above the matching threshold, the system forces a near match. The near match will require human intervention to resolve.



## Poll #1

Select the best answer on your screen.

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Let's take a look at a poll in the webinar. Just click on the best answer on your screen.



## Poll #1

Which of the following DirectMatch outcomes requires human intervention to resolve?

Answers:

- Match
- Near Match
- No Match
- All of the above

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Which of the following DirectMatch outcomes requires human intervention to resolve?

Answers:

- Match
- Near Match
- No Match
- All of the above





## Poll #1

Which of the following DirectMatch outcomes requires human intervention to resolve?

Answers:

- Match
- Near Match
- No Match
- All of the above

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Which of the following DirectMatch outcomes requires human intervention to resolve?

Answers:

- Match
- **Near Match**
- No Match
- All of the above



# The DirectMatch System

Now let's look at the DirectMatch System.



## Batches and Transactions

Batches and Transactions

# The DirectMatch System

Home

Pending Work

Population Status

Due 5/1

Election Status

Due 6/30

District Summary

Schools




135

Recent Activity

BATCHES

TRANSACTIONS

Pending - 5 Most Recent

Batch Info	Match Type	Location Info	Process Info	Record Info
 12584 DM Person ID (State)	TANF	State Batch	07/06/2021 5:07 PM	328 of 8000 PENDING
 12583 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	07/06/2021 3:27 PM	1 of 1 PENDING
 12582 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	07/06/2021 3:27 PM	1 of 1 PENDING

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The user's landing page is determined by the user's role. The DirectMatch page will be the default page for all DirectMatch users.

Home

Pending Work

Population Status

Election Status

Due 5/1

Due 6/30

District Summary

Schools

135

Recent Activity

Batches

Transactions

Pending - 5 Most Recent

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info
12266 DM Person ID (State)	Foster	State Batch	05/25/2021 9:09 AM	37 of 2000 PENDING	Pending: Near Matches
12265 DISTRICT_SEARCH_002_20210525_970319 DM Person ID	SNAP	District of Columbia (002) All Schools	05/25/2021 6:01 AM	5558 of 563783 PENDING	Pending: In Progress
12262 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/24/2021 12:29 PM	0 PENDING	Pending: Request Loaded
12259 DISTRICT_SEARCH_002_20210523_970229 DM Person ID	SNAP	District of Columbia (002) All Schools	05/23/2021 6:01 AM	563783 PENDING	Pending: Near Matches
12257 DISTRICT_SEARCH_002_20210522_970244 DM Person ID	SNAP	District of Columbia (002) All Schools	05/22/2021 6:01 AM	563783 PENDING	Pending: Near Matches

Completed - 5 Most Recent

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info
------------	------------	---------------	--------------	-------------	-------------

The menu bar on the left side of the page is the main navigation tool.  
Click the > sign to expand the menu.

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The menu bar on the left side of the page is the main navigation tool.  
Click the > sign to expand the menu.

HOME

WATCH OPTIONS

CEP MANAGER

STUDENT SEARCH

Home

**Pending Work**

Population Status **Due 5/1**

Election Status **Due 6/30**

**District Summary**

Schools **135**

**Recent Activity**

Batches Transactions

**Pending - 5 Most Recent** [View](#)

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info
12266 DM Person ID (State)	Foster	State Batch	05/25/2021 9:09 AM	37 of 2000 PENDING	Pending: Near Matches
12265 DISTRICT_SEARCH_002_20210525_070319 DM Person ID	SNAP	District of Columbia (002) All Schools	05/25/2021 6:01 AM	5558 of 563783 PENDING	Pending: In Progress
12262 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/24/2021 12:20 PM	0 PENDING	Pending: Request Loaded
12259 DISTRICT_SEARCH_002_20210523_070229 DM Person ID	SNAP	District of Columbia (002) All Schools	05/23/2021 6:01 AM	563783 PENDING	Pending: Near Matches
12257 DISTRICT_SEARCH_002_20210522_070244 DM Person ID	SNAP	District of Columbia (002) All Schools	05/22/2021 6:01 AM	563783 PENDING	Pending: Near Matches

**Completed - 5 Most Recent** [View](#)

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info
		Gardere Community Christian School			

The home button is the first option on the navigation bar. All navigation options are determined by the user's role. The user can also access Match Options and Student Search.

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The home button is the first option on the navigation bar.  
 All navigation options are determined by the user's role.  
 The user can also access Match Options and Student Search.  
 The CEP Manager option will only appear on the menu if the user has rights to CEP Manager.

The Dashboard or Home Page contains the user's most recent activity in the system. New in version 2020 is the concept of transaction. Transactions are individual records.

The Dashboard or Home Page contains the user's most recent activity in the system. The dashboard displays the most recent batch information. Batches are a group of records submitted to the system at the same time.

New in version 2020 is the concept of transactions. Transactions are individual records. Users may view and work on individual transactions before an entire batch of records completes processing.

Transactions are individual records. The five most recent pending transactions are shown on this page. On the right side of the page, the user may view all pending transactions, view the past 7 days or take action to resolve the near matches.

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Transactions are individual records. The five most recent pending transactions are shown on the transaction page.

On the right side of the page, the user may view all pending transactions, view the past 7 days or take action to resolve the near matches.





## Searching for a Batch and Downloading Results

Searching for a Batch and Downloading Results



Home > Match History

### Match History

Batches Transactions

Filter Options

Batch ID: 12279 Match Type: SNAP Status:   
District: School: School Year: 2021 Process Date Range:   
Reset Filter Data

I entered Batch ID 12279 and selected the match type SNAP. Click Filter Data.

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I entered Batch ID 12266 and selected the match type SNAP. Click Filter Data.

Home / Match History

### Match History

Batches Transactions

Filter Options

Batch ID: 12279 Match Type: SNAP Status:

District: School: School Year: 2021 Process Date Range: mm to mm

Reset Filter Data

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
12279 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/26/2021 1:43 PM	1	Completed	

1 - 1 of 1

Previous 1 Next

The system searched for the particular batch and returned the batch results. The status is Completed and the Record Info shows there was only 1 record in this batch.

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The system searched for the particular batch and returned the batch results. The status is Completed and the Record Info shows there was only 1 record in this batch.

Home > Match History

### Match History

[Batches](#) [Transactions](#)

[Filter Options](#)

Batch ID:  Match Type:  Status:

District:  School:  School Year:  Process Date Range:  to

[Reset](#) [Filter Data](#)

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
12279 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/26/2021 1:43 PM	1	Completed	<a href="#">Download</a> <a href="#">View Batch Details</a>

1 - 1 of 1

[Previous](#) [1](#) [Next](#)

[Click Here](#)

By clicking the Actions button, the user can now download the results or view the batch details. Let's look at the details first.

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By clicking the Actions button, the user can now download the results or view the batch details. Let's look at the details first.

### Process Details

Displays details about processing.

Status Statistics

Match Status	Record Count
Match / No Match (Completed)	
Match	1

Processing Stage

Stage	Processing Date
Validation Started	07/06/2021 03:11:47 PM
Validation Completed	07/06/2021 03:11:47 PM
Match Started	07/06/2021 03:11:47 PM
Match Complete	07/06/2021 03:11:50 PM

Next Steps

Download

Click Download

View Transactions

General Information

Match Type	Foster
District	District of Columbia (002)
School	Christian Acres Youth Center Inc. (002003)
Extract Date	N/A
Extract File	THEV3FILE_NEW...

The Batch Process Details provides information about the processing stages. From this page the user can also download the batch or view the transactions. Click Download.

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The Batch Process Details provides information about the processing stage. From this page the user can also download the batch or view the transactions. Click Download.

Download Options

Match Status

Status	Match Date	Status Record Count	Total Record Count

Format

File Format

Version 3.0

Version 3.0+

DirectMatch Index

Delimiter

Tab

Comma

Qualifier

Double Quotes ( " )

Single Quote ( ' )

None

Date Format

mm/dd/yyyy

Include Header/Footer

Yes

No

Click Here

Generate Extract

Download History

User ID	Download Date
system@escholar.com	05/26/2021 04:39:23 am
system@escholar.com	05/26/2021 04:39:38 am

The user should select the DirectMatch Index file format. Click Generate Extract. Some browsers will automatically download the file while others will prompt the user before downloading the file. The user can then upload the file into their source system.

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The user should select DirectMatch Index file format.

Click Generate Extract.

Some browsers will automatically download the file while others will prompt the user before downloading the file.

The user can then upload the file into their source system.

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## The Match and No Match Process

Now let's follow the matching process from the beginning to the end for Match and No Match records.



Batches

Transactions

Pending - 5 Most Recent

697542

DM Person ID (State)

697541

DM Person ID (State)

697540

DM Person ID (State)

697539

DM Person ID (State)

697538

DM Person ID (State)

Transaction Info

Match Type

Location Info

Process Info

Batch ID

Status Info

Actions

Foster

District of Columbia (002)  
Christian Acres Youth Center Inc. (002003)

05/25/2021  
9:09 AM

12266

Click Here

In this new version, items that are still pending are highlighted with a warning indicator which lets the user know further action is needed. The user will click Resolve to see the near matches and choose an appropriate resolution. More about near matches later in this session.

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In this new version, items that are still pending are highlighted with a warning indicator which lets the user know further action is needed. The user will click Resolve to see the near matches and choose an appropriate resolution. More about near matches later in this session.

Batches

Transactions

Pending - 5 Most Recent

Transaction Info

Match Type

Location Info

Process Info

Batch ID

Status Info

View Past 7 Days

View All

Actions

697542

DM Person ID (State)

Foster

District of Columbia (002)  
Christian Acres Youth Center Inc. (002003)

05/25/2021  
9:09 AM

12266

Transaction ID 691939 has been submitted to the system as a record in batch 12261. It has completed processing. Click the three dots. The same process works for batches that have completed processing.

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Individual records or transactions will be submitted to the system, processed and the result will be match, no match or near match. Match records can be downloaded. No match records require no further action. Near match records must be resolved by human intervention. Transaction ID 691939 has been submitted to the system as a record in batch 12261. It has completed processing. Click view to download the record.

Most Recent						View Past 7 Days	View All >
Insaction Info	Match Type	Location Info	Process Info	Batch ID	Status Info	Actions	
7542 Person ID (State)	Foster	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/25/2021 9:09 AM	12266	Pending: Near Matches	Resolve	⋮
7541 Person ID (State)	Foster	District Route To for Unknowns 2 (004) Red River High School (004004)	05/25/2021 9:09 AM	12266	Pending: Near Matches	Resolve	⋮
7540 Person ID (State)	Foster	District Route To for Unknowns 2 (004) Carenco Heights Elementary School (004011)	05/25/2021 9:09 AM	12266	Pending: Near Matches	Resolve	⋮
7539 Person ID (State)	Foster	City of Baker School District (068) Baker Middle School (068003)	05/25/2021 9:09 AM	12266	Pending: Near Matches	Resolve	⋮
7538 Person ID (State)	Foster	District Route To for Unknowns 2 (004) Red River High School (004004)	05/25/2021 9:09 AM	12266	Pending: Near Matches	Resolve	⋮
5 Most Recent						View Past 7 Days	View All >
Insaction Info	Match Type	Location Info	Process Info	Batch ID	Status Info	Actions	
7503 Individual	SNAP	District Route To for Unknowns 3 (009) All Schools	05/25/2021 7:55 AM		Completed	View	⋮
1944 Individual	SNAP	District Route To for Unknowns (003) Epiphany Day School (003008)	05/25/2021 6:01 AM		Completed	View	⋮
1943 Individual	SNAP	City of Baker School District (068) Baker Middle School (068003)	05/24/2021 8:03 PM		Completed	View	⋮
1939 Person ID	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/24/2021 10:23 AM	12261	Completed	View	⋮
1938 Person ID	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/24/2021 10:22 AM	12261	Completed	Download	⋮
						View Transaction Details	

Click  
Download

Click Download.

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Click download.

Transaction Profile

Contains one or many records.

691939

Transaction ID

DM Person ID

Submission Type

05/24/2021 10:05 AM

Process Info

12261

Related Batch

Completed

Status

DETAILS

DOWNLOAD

Download Options

Match Status

Status

Total Record Count

Format

Version 3.0

Version 3.0+

DirectMatch Index

File Format

Tab

Comma

Delimiter

Double Quotes (")

Single Quote (')

None

Qualifier

mm/dd/yyyy

Date Format

Yes

No

Include HeaderFooter

Click Generate Extract

Generate Extract

Download History

User ID	Download Date
system@escholar.com	05/24/2021 08:54:31 am

The user lands on the transaction profile download page. The bar across the top provides information about the transaction. The download format should be the same as was used in Version 11.  
Click Generate Extract.

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The user lands on the transaction profile download page. The bar across the top provides information about the transaction. The download format should be the same as was used in Version 11.  
Click Generate Extract.

56

Match Status

Status	Match Date	Status Record Count	Total Record Count

Format

File Format

Version 3.0 Version 3.0+ DirectMatch Index

Delimiter

Tab Comma

Qualifier

Double Quotes (") Single Quote (') None

Date Format

mm/dd/yyyy

Include Header/Footer

Yes No

Generate Extract

User ID

system@escholar.com

Download Date

05/24/2021 08:54:31 am

Extract File(s)

Extract Date	Match Type	Location Info	Match Status	Record Count	Extract Name	Extract Status	Actions
05/25/2021 10:13:48M	QUEUED	QUEUED	QUEUED	of	SEARCH_EXTRACT_20210525101527254.TAB	QUEUED	Refresh

Click Refresh

The extract file is shown below the format information. Click Refresh if the file hasn't completed.

The extract file is shown below the format information. Click Refresh if the file hasn't completed.

Status	Match Date	Status Record Count	Total Record Count				
<b>Format</b>							
File Format	Version 3.0 <b>Version 3.0+</b> DirectMatch Index						
Delimiter	<b>Tab</b> Comma						
Qualifier	Double Quotes ( " )   Single Quote ( ' ) <b>None</b>						
Date Format	mm/dd/yyyy						
Include Header/Footer	Yes <b>No</b>						
<a href="#">Generate Extract</a>							
<b>Extract File(0)</b>							
Extract Date #	Match Type #	Location Info #	Match Status #	Record Count #	Extract Name #	Extract Status #	Actions
05/25/2021 10:15 AM	SNAP	District of Columbia (002) Christian Areas Youth Center Inc. (002003)	Canceled - Selected during Match Resolution stage	0 of 0	SEARCH_EXTRACT_30210525101527254.TAB	COMPLETED	<a href="#">Download</a>

Click  
Download

Click download to download the transaction. This process works the same for batches. For a transaction, you are downloading only one record. For a batch, you are downloading all records in the batch. You can open the file in Notepad or load matched records to your source system.

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Click download to download the transaction. This process works exactly the same for batches. For a transaction, you are downloading only one record. For a batch, you are downloading all records in the batch. You can open the file in Notepad or load matched records to your source system.



## Poll #2

Select the best answer on your screen.

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Let's take a look at a poll in the webinar. Just click on the best answer on your screen.



## Poll #2

What is the difference between a batch and a transaction?

Answers:

- A batch is many records submitted at the same time; a transaction is only one record.
- A batch is only output records; a transaction is input and output records.
- A batch has an ID and a transaction does not.

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What is the difference between a batch and a transaction?

Answers:

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## Poll #2

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What is the difference between a batch and a transaction?
















Answers:

- **A batch is many records submitted at the same time; a transaction is only one record.**
- A batch is only output records; a transaction is input and output records
- A batch has an ID and a transaction does not.



Near Match

Next let's take a deeper look at the matching process for Near Match records.

Recent Activity							
BATCHES   TRANSACTIONS							
Pending - 5 Most Recent							
Batch Info		Match Type	Location Info	Process Info	Record Info	Status Info	Actions
	12348 DISTRICT_SEARCH_002_20210607_115938 DM Person ID	Foster	District of Columbia (002) <i>Christian Acres Youth Center Inc. (002003)</i>	06/07/2021 10:57 AM	3 of 567750 PENDING	 Pending: In Progress	Refresh 
	12347 DISTRICT_SEARCH_002_20210607_091206 DM Person ID	SNAP	District of Columbia (002) <i>All Schools</i>	06/07/2021 6:01 AM	5538 of 563783 PENDING	 Pending: In Progress	Refresh 
	12344 DM Person ID	SNAP	District of Columbia (002) <i>All Schools</i>	06/06/2021 9:15 PM	0 PENDING	 Pending: Request Loaded	Refresh 
	12343 DM Person ID (State)	SNAP	State Batch	06/04/2021 2:47 PM	10144 of 20000 PENDING	 Pending: Near Matches	Refresh 
	12342 DISTRICT_SEARCH_004_20210604_153826 DM Person ID	TANF	District Route To for Unknowns 2 (004) <i>All Schools</i>	06/04/2021 2:37 PM	1466 of 664610 PENDING	 Pending: Near Matches	Resolve 

Batch 12342 contains TANF data with Pending Near Matches. The near matches must be resolved before the user can download the entire batch. Click Resolve.

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Batch 12342 contains TANF data with Pending Near Matches. The near matches must be resolved before the user can download the entire batch. Click Resolve.

Home > Pending Near Match

**NEAR MATCHES FOUND:**

The system found Near Matches which should be reviewed and resolved by a user.  
Next Steps: Review Near Matches below

2  
Near Matches

Filter Options

Transaction ID :

Batch ID : 12342

Submission Type :

Match Type :

District :

School :

School Year :

Reset Filter Data

Pending Near Matches

When drilling in, the system filters on batch ID 12342 and displays all the transactions in the near match status. Monique Whitehead has 1 potential match. Click the downward triangle to see the potential near match.

When drilling in, the system filters on batch ID 12342 and displays all the transactions in the near match status. Monique Whitehead has 1 potential match. Click the downward triangle to see the potential near match.

Transaction ID :
Batch ID : 12342
Submission Type :
Match Type :

District :
School :
School Year :

Reset
Filter Data

Pending Near Matches

Submission Record

Monique Whitehead  
District Route To for Unknowns 2 (004)  
Red River High School (004004)

DOB: 09/09/1998  
Grade: -  
Local ID: -

Race: -  
Gender: Female  
SSN: 765-12-1343

93%  
Max Match Score

1  
Potential Matches

Click Here

Potential Matches to Program Index Record

Person Name	Location	DOB	Grade	Local ID	Race	Gender	SSN	Match Score	Actions
MONIQUE WHITEHEAD 0000003512597	--	09/23/1998					765-12-1343	93%	Or Click Here

The submission record shows Monique Whitehead, Female with DOB 09/09/1998. On this screen we can see 1 potential near match, Monique Whitehead with a different birthdate. The user should click either double arrow to see more information.

The submission record shows Monique Whitehead, Female with DOB 09/09/1998. On this screen we can see 1 potential near match, Monique Whitehead with a different birthdate. The user should click either double arrow to see more information.

## The Compare Records Page:

- ✓ On the compare records page, the fields with differences are highlighted in yellow.
- ✓ Scroll down to see additional data fields before making a match decision.
- ✓ In this case we see the birthdates are different, but the social security number is the same.
- ✓ The user should investigate the birthdate at the district level.

The screenshot displays a 'Compare Records' interface. At the top right, there are buttons for 'Cancel Submission Record' and 'No Match'. The main area is divided into two columns: 'SUBMISSION RECORD' and 'NEAR MATCH RECORD'. The 'SUBMISSION RECORD' has a source of 'DM Person ID'. The 'NEAR MATCH RECORD' has a source of 'TANF' and a 'Match Score' of 93%. Below this, a 'Matching Fields' table compares various attributes. Fields with differences are highlighted in yellow. The 'DOB' field is highlighted in orange, indicating a significant difference. The 'SSN' field is highlighted in yellow, indicating a difference. The 'Person Information' section is at the bottom.

Matching Fields	
First Name	Monique
Middle Name	
Last Name	Whitehead
Suffix Name	
Alternate Last Name	
Gender	Female
DOB	09/09/1998
SSN	765-12-1343

Person Information

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- ✓ On the compare records page, the fields with differences are highlighted in yellow.
- ✓ Scroll down to see additional data fields before making a match decision.
- ✓ In this case we see the birthdates are different, but the social security number is the same.
- ✓ The user should investigate the birthdate at the district level.

# Select the Near Match Resolution

After investigating the students, select the near match resolution from the three options:

	<b>Match</b>		<b>No Match</b>		<b>Cancel Record</b>
---	--------------	---	-----------------	---	--------------------------

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The user must investigate the student data at the school district. Then, the user will select the near match resolution from the three possible resolutions:

Match

# Select the Near Match Resolution

After investigating the students, select the near match resolution from the three options:



**Match**



**No Match**



**Cancel  
Record**

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No Match



# Select the Near Match Resolution

After investigating the students, select the near match resolution from the three options:



**Match**



**No Match**



**Cancel  
Record**

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Cancel Record

SUBMISSION RECORD

Source: DM Person ID

NEAR MATCH RECORD

Source: TANF

93%

Match Score

Match:ID 0000003512597

Cancel Submission Record

No Match

Cancel Record

No Match

Match: ID 0000003512597

Matching Fields	
First Name	Monique
Middle Name	
Last Name	Whitehead

The user can select Match, No Match or Cancel Submission Record from the top of the comparison screen. For Match, choose Match: ID 0000003512597 or choose Cancel Record or No Match. The Match ID Source is identified above the Match button. In this case the Source is the TANF program record.

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The user can select Match, No Match or Cancel Submission Record from the top of the comparison screen. For Match, choose Match: ID 0000003512597 or choose Cancel Record or No Match. The Match ID Source is identified above the Match button. In this case the Source is the TANF program record.

Physical Street Address	
Physical Street Address 2	
Physical City	
Physical State	
Physical Zip	
HHousehold SSN	
Household Name	

Match: ID  
0000003512597

Cancel  
Record

No  
Match

Match:ID 0000003512597

Cancel Submission Record

No Match

The user can also select Match, No Match or Cancel Submission Record from the bottom of the screen. For Match, choose Match: ID 0000003512597, or choose Cancel Record or No Match.

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The user can also select Match, No Match or Cancel Submission Record from the bottom of the screen.

For Match, choose Match: ID 0000003512597, or choose Cancel Record or No Match.

[Cancel Submission Record](#)
[No Match](#)

**SUBMISSION RECORD**

Source: DM Person ID

**NEAR MATCH RECORD**

Source: TANF

93%

Match Score

Match: ID 0000003512597

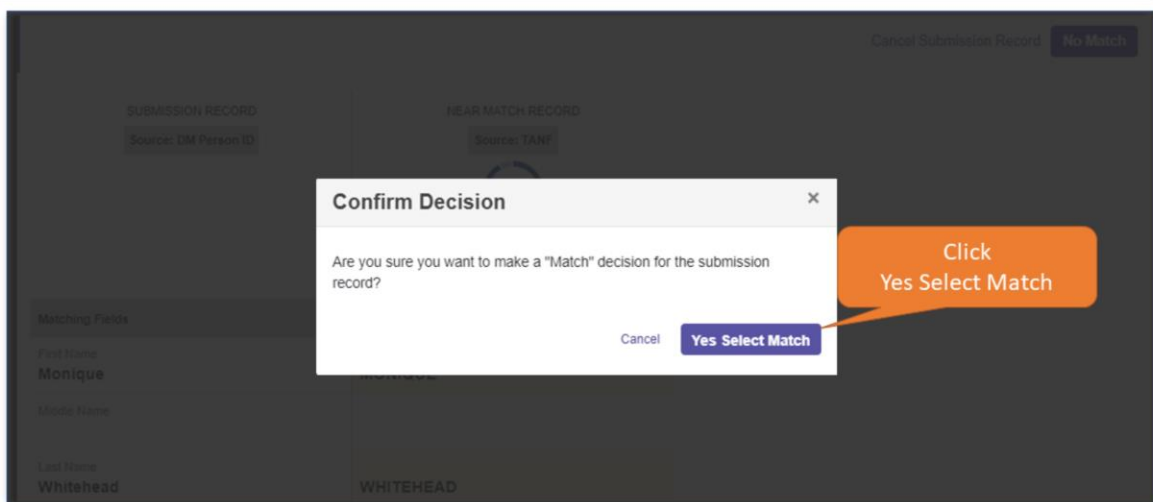
**Click Match: ID 000000351297**

Matching Fields	
First Name	Monique
Middle Name	
Last Name	Whitehead

For our first example, Monique Whitehead, we have reviewed the data and decided that the Near Match Record matches the Submission Record. Again, note the Match ID number Source is TANF. Let's click the Match button.

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For our first example, Monique Whitehead, we have reviewed the data and decided that the Near Match Record matches the Submission Record. Again, note the Match ID number Source is TANF. Let's click the Match button.



The Confirm Decision pop-up appears.  
Click Yes Select Match.

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The Confirm Decision pop-up appears.  
Click Yes Select Match.


**NEAR MATCHES FOUND:**

The system found Near Matches which should be reviewed and resolved by a user.

**Next Steps: Review Near Matches below**

1

Near Matches

Filter Options

Transaction ID :

Batch ID :

Submission Type :

Match Type :

920

District :

School :

School Year :

Sort By :

2020

Max Match Score ...

Reset

Filter Data

Pending Near Matches

Submission Record

Andrea L Hartman

Acadia Parish (027)

Brownfields Elementary School (027018)

DOB: 02/01/1992

Grade: 4

Local ID: 1122

Race: White

Gender: Female

SSN: 123-45-6789

94%

Max Match Score

2

Potential Matches

The user is returned to the Near Matches Found panel.  
From here, the user can continue to resolve near matches or select the home button.

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The user is returned to the Near Matches Found panel.  
From here, the user can continue to resolve near matches or select the home button.

**Pending Near Matches Queued**  
 A Match Decision is required.  
 Record submitted by Andrea Hartman on 05/12/2021

[View Pending Near Match List](#)  
[View Transaction Details](#)

Click No Match

Cancel Submission Record

No Match

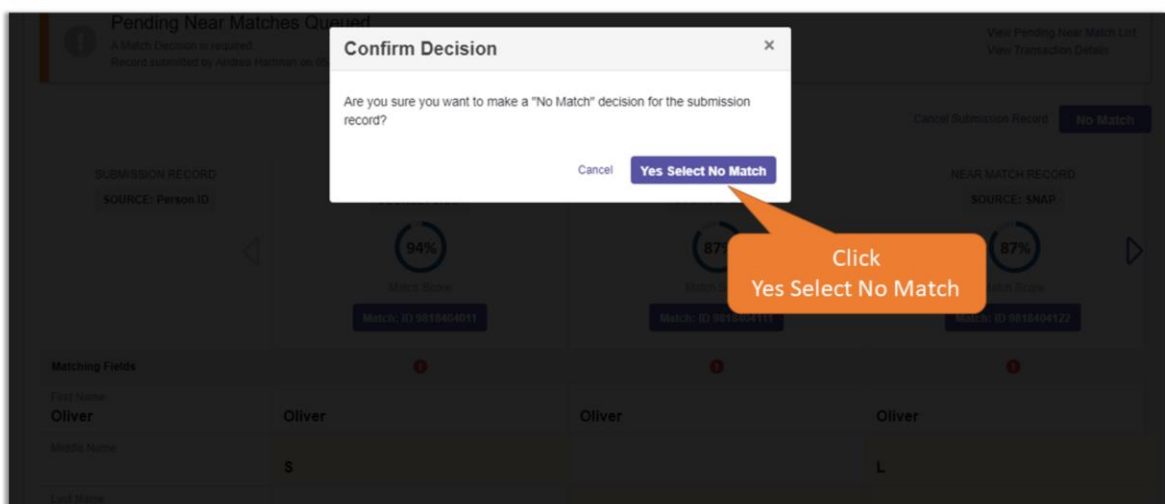
SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD
SOURCE: Person ID	SOURCE: SNAP	SOURCE: SNAP	SOURCE: SNAP
	<div>94%</div> <div>Match Score</div> <div>Match: ID 9818404011</div>	<div>87%</div> <div>Match Score</div> <div>Match: ID 9818404111</div>	<div>87%</div> <div>Match Score</div> <div>Match: ID 9818404122</div>
Matching Fields			
First Name	Oliver	Oliver	Oliver
Middle Name	S		L

Now let's look at a No Match example. After reviewing the data for Oliver Jones, we have decided that none of the options are a match to the submission record.

Click No Match.

Now let's look at a No Match example. After reviewing the data for Oliver Jones, we have decided that none of the options are a match to the submission record.

Click No Match.



Again, the Confirm Decision pop-up appears.  
Click Yes Select No Match.

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Again, the Confirm Decision pop-up appears.  
Click Yes Select No Match.



**Match Decision**  
 The submission record was not matched to an existing record.  
 Resolved by: Elaine Rulla on 07-07-2021

[View Pending Near Match List](#)  
[View Transaction Details](#)

SUBMISSION RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD	NEAR MATCH RECORD
SOURCE: Person ID	SOURCE: SNAP	SOURCE: SNAP	SOURCE: SNAP
	94% Match Score No Match	87% Match Score No Match	87% Match Score No Match
<b>Matching Fields</b>			
First Name	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name			

When selecting No Match, the No Match Decision Panel appears on the top of the page. If there are additional Near Matches to be resolved in the batch, the No Match Decision panel will contain the option to View the Pending Near Match List. If there are no additional near matches in the batch, the No Match Decision Panel will contain the options to View Home Page or View Transaction Details.

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When selecting No Match, the No Match Decision Panel appears on the top of the page. If there are additional Near Matches to be resolved in the batch, the No Match Decision panel will contain the option to View the Pending Near Match List. If there are no additional near matches in the batch, the No Match Decision Panel will contain the options to View Home Page or View Transaction Details.

**Match Decision**  
 The submission record was not matched to an existing record.  
 Resolved by: Elaine Rulla on 07-07-2021

Select View Pending Near Match List

[View Pending Near Match List](#)  
[View Transaction Details](#)

SUBMISSION RECORD  
 SOURCE: Person ID

NEAR MATCH RECORD  
 SOURCE: SNAP  
 94%  
 Match Score  
 No Match

NEAR MATCH RECORD  
 SOURCE: SNAP  
 87%  
 Match Score  
 No Match

NEAR MATCH RECORD  
 SOURCE: SNAP  
 87%  
 Match Score  
 No Match

Matching Fields			
First Name	Oliver	Oliver	Oliver
Middle Name	S		L
Last Name			

The user can select View Pending Near Match List to view other near matches in the batch.

The user can select View Pending Near Match List to view other near matches in the batch.



### Poll #3

Select the best answer on your screen.

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Let's take a look at a poll in the webinar. Just click on the best answer on your screen.



### Poll #3

What are the three possible resolutions for a Near Match?

Answers:

- Match, Input, Validation.
- Near Match, No Match, Input Record.
- Match, No Match, Cancel Record.
- All of the above.

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What are the three possible resolutions for a Near Match?

Answers:

- Match, Input, Validation.
- Near Match, No Match, Input Record.
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### Poll #3

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- Near Match, No Match, Input Record
- Match, No Match, Cancel Record
- All of the above

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What are the three possible resolutions for a Near Match?

Answers:

- Match, Input, Validation
- Near Match, No Match, Input Record
- Match, No Match, Cancel Record
- All of the above



## Downloading Match Records

Downloading Match Records

12276 DM Person ID	SNAP	School (729) All Schools	05/26/2021 12:35 PM	0 PENDING	Pending: Request Loaded	Refresh
12274 DISTRICT_SEARCH_009_20210526_114519 DM Person ID	SNAP	District Route To for Unknowns 3 (009) All Schools	05/26/2021 10:44 AM	60 of 3449 PENDING	Pending: Near Matches	Resolve
12272 DISTRICT_SEARCH_002_20210526_070225 DM Person ID	SNAP	District of Columbia (002) All Schools	05/26/2021 6:01 AM	5861 of 563783 PENDING	Pending: In Progress	Refresh
12270 DM Person ID (State)	TANF	State Batch	05/25/2021 4:05 PM	388 of 8000 PENDING	Pending: Near Matches	Resolve
12269 DM Person ID (State)	Foster	State Batch	05/25/2021 4:04 PM	5 of 2000 PENDING	Pending: Near Matches	Resolve
Completed - 5 Most Recent						
Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
12275 DM Person ID	Medicaid	Special School District (101700) All Schools	05/26/2021 12:31 PM	0	Completed	
12273 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	05/26/2021 9:57 AM	1	Completed	
12271 DM Person ID	Foster	Gardere Community Christian School (729) All Schools	05/26/2021 6:00 AM	0	Completed	
12267 DISTRICT_SEARCH_068_20210525_111647 DM Person ID	SNAP	City of Baker School District (068) All Schools	05/25/2021 10:16 AM	147462	Pending: Errors	View
12266 DM Person ID (State)	Foster	State Batch	05/25/2021 9:09 AM	2000	Completed	

Click  
Download

Download  
View Batch Details

We are back on the home screen where we can view the Pending-5 most recent and Completed-5 most recent. Let's look at batch 12266. Click Download.

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We are back on the home screen where we can view the Pending-5 most recent and Completed-5 most recent. Let's look at batch 12266. Click Download.

Batch Profile

Contains one or many records.

12266

Batch ID

DM Person ID (State)

Submission Type

05/25/2021 03:20 PM

Process Info

Completed

Status

DETAILS

DOWNLOAD

Download Options

Match Status

Status	Match Date	Downloadable Record Count	Total Record Count
Match / No Match (Completed)			
Match	07/06/2021	1	1

Format

File Format

Version 3.0 | Version 3.0+ | **DirectMatch Index**

Delimiter

Tab | Comma

Qualifier

Double Quotes (") | Single Quote (') | None

Date Format

mm/dd/yyyy

Include Header/Footer

Yes | No

Generate Extract

Download History

User ID	Download Date
system@escholar.com	05/25/2021 10:14:34 am
system@escholar.com	05/25/2021 10:14:34 am
system@escholar.com	05/25/2021 10:14:34 am
system@escholar.com	05/25/2021 10:14:35 am
system@escholar.com	05/25/2021 11:28:46 am
system@escholar.com	05/25/2021 11:28:46 am
system@escholar.com	05/25/2021 11:28:46 am
system@escholar.com	05/25/2021 11:28:46 am
system@escholar.com	05/25/2021 11:28:48 am

On the batch profile page, select the file format **DirectMatch Index** and click **Generate Extract**. The user can then refresh the page and download the file.

Click  
Generate Extract

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On the batch profile page, select the file format DirectMatch Index and click Generate Extract. The user can then refresh the page if needed and download the file.



# The DirectMatch Download

---

- ✓Includes the students which were matched during the specific file or Batch upload.
- ✓The export does not include students that were matched previously in the same school year.

---

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## The DirectMatch Download:

- Includes the students which were matched during the specific file or Batch upload.
- The export does not include students that were matched previously in the same school year.



## Poll #4

Select the best answer on your screen.

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Let's take a look at a poll in the webinar. Just click on the best answer on your screen.



#### Poll #4

What does a batch download contain?

Answers:

- Batch downloads contain all records for the entire school year.
- Batch downloads contain only one record.
- Batch downloads contain all records that were matched during the specific file upload.
- All of the above.

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What does a batch download contain?

Answers:

- Batch downloads contain all records for the entire school year.
- Batch downloads contain only one record.
- Batch downloads contain all records that were matched during the specific file upload.
- All of the above.



## Poll #4

What does a batch download contain?

Answers:

- Batch downloads contain all records for the entire school year.
- Batch downloads contain only one record.
- Batch downloads contain all records that were matched during the specific file upload.
- All of the above

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What does a batch download contain?

Answers:

- Batch downloads contain all records for the entire school year.
- Batch downloads contain only one record.
- **Batch downloads contain all records that were matched during the specific file upload.**
- All of the above

## Match Options: Person and Address

Match Options: Person and Address



Match Options: Person

Person

Home > Match Options

Match Options

PERSON ADDRESS

Match Option

Person ID Upload File Individual Match Manual Authorization

District

All Districts Specific District

School

All Schools

Match Type

Reset Match

To access match options from the navigation bar, click the checkmark icon.  
The options are: Person ID, Upload File, Individual Match and Manual Authorization.

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To access match options from the navigation bar, click the checkmark icon.  
The options are: Person ID, Upload File, Individual Match and Manual Authorization.

Match Options

PERSON

ADDRESS

Match Option

Person ID

Upload File

Individual Match

Manual Authorization

District

All Districts

Specific District

District Name

CEP Test District (234756) [\(change\)](#)

School

All Schools

Match Type

SNAP

Reset

Match

Click Match

Person ID selection uses the Secure ID data to match against the program data for the program selected. Select the program SNAP. Click Match.

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Person ID selection uses the Secure ID data to match against the program data for the program selected. Select the program SNAP. Click Match.



Match Result						
Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
12294 DISTRICT_SEARCH_234756_20210528_141051 DM Person ID	SNAP	CEP Test District (234756) All Schools	05/28/2021 1:10 PM	48	Completed	<div>Click Download</div> <div>Download</div> <div>View Batch Details</div>

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The Person ID match has completed. The user can download the file by clicking Download.

The Person ID match has completed. The user can download the file by clicking Download.

**Match Options**

PERSON ADDRESS

Match Option: Person ID **Upload File** Individual Match Manual Authorization

File: Choose file **Browse**

District: CEP Test District (234756) (change)

Match Type: SNAP

☐ Foster  
☐ Medicaid  
☐ TANF  
☒ SNAP

Click Match

Reset Match

Upload File: The file you upload may contain students who do not yet have a Secure ID. Otherwise, use Person ID to Match. In this example, the user has selected SNAP for the match type. Click Browse to locate the file you wish to upload. Then click Match.

Upload File: The file you upload may contain students who do not yet have a Secure ID. Otherwise, use Person ID to Match. In this example, the user has selected SNAP for the match type. Click Browse to locate the file you wish to upload. Then click Match.

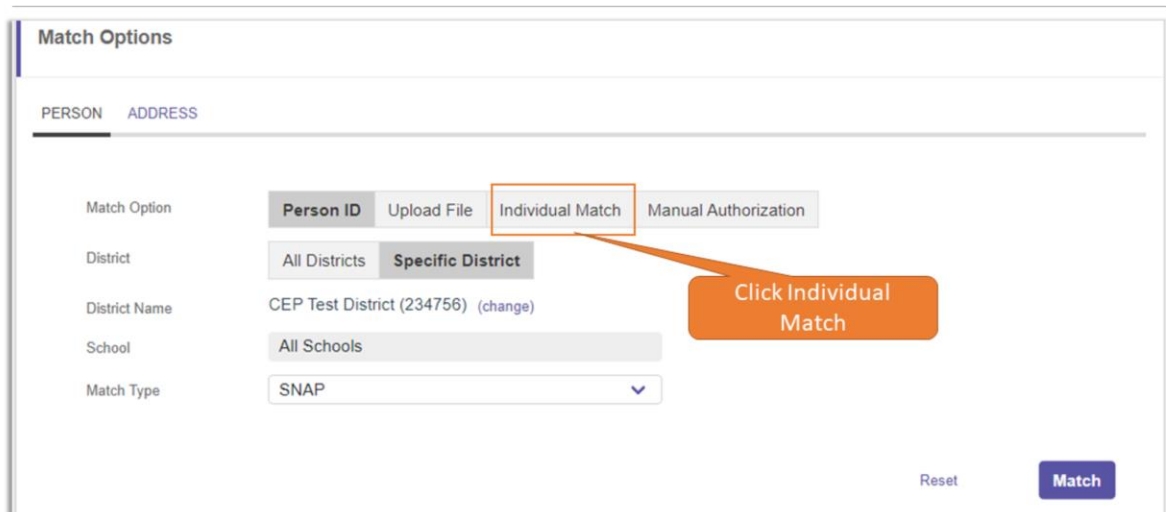
**Match Options**

PERSON ADDRESS

---

Match Option	<b>Person ID</b> Upload File <b>Individual Match</b> Manual Authorization
District	All Districts <b>Specific District</b>
District Name	CEP Test District (234756) (change)
School	All Schools
Match Type	SNAP

Reset **Match**



Click Individual Match to enter information for a specific student.

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Click Individual Match to enter information for a specific student.

## Individual Match

- ✓ Select the Match Type
- ✓ Enter the student information
- ✓ First Name - required
- ✓ Last Name - required
- ✓ Gender
- ✓ Date of Birth
- ✓ The more information you can provide, the more accurate the search result.

The screenshot shows a web form titled "Individual Match" with several tabs: "Person ID", "Upload File", "Individual Match" (which is selected), and "Manual Authorization". Below the tabs, there are fields for "District" (set to "CEP Test District (234756)" with a "(change)" link), "School" (a "Search Building" button), "Match Type" (a dropdown menu set to "SNAP"), and "Person Type" (a button labeled "Student"). A section titled "Personal Details" with a person icon contains fields for "First Name", "Middle Name (optional)", "Last Name", "Alternate Last Name (optional)", and "Suffix (optional)". Below these are "Gender" buttons for "Female", "Male", and "Unknown", a "DOB" field with a date format "mm/dd/yyyy" and a calendar icon, and an "Ethnicity (optional)" dropdown menu.

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On the Individual Match Tab:

- ✓ Select the Match Type
- ✓ Enter the student information
- ✓ First Name - required
- ✓ Last Name – required
- ✓ Gender
- ✓ Date of Birth
- ✓ The more information you can provide, the more accurate the search result.

## Individual Match

- ✓ Scroll down the page
- ✓ The more information you can provide, the more accurate the search result.
- ✓ Click Match to match the record.

The screenshot shows a web form titled "Individual Match". It contains several input fields and dropdown menus for personal information: "Race 4 (optional)", "Race 5 (optional)", "Full Name (optional)", "SSN (optional)" (with a masked input "###-##-####"), "Local ID", "Source", "State ID (optional)", and "Grade". Below these is a section titled "Address" with a house icon, containing fields for "Address 1 (optional)", "Address 2 (optional)", "City (optional)", "State (optional)" (with a dropdown arrow), and "Zip (optional)". At the bottom right of the form, there is a "Reset" link and a blue "Match" button. An orange callout bubble with the text "Click Match" points to the "Match" button.

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Scroll down and click Match at the bottom of the page.

## Match Options

PERSON ADDRESS

Match Option

Person ID

Upload File

Individual Match

Manual Authorization

State ID

1007179317

Reset


Click Match

Match

**Manual Authorization:** The user can manually add a student to a specific program through the Manual Authorization tab. The user enters the student Secure ID and clicks Match.

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**Manual Authorization:** The user can manually add a student to a specific program through the Manual Authorization tab. The user enters the student Secure ID and clicks Match.

<b>Jazmin Rubio</b> (1007179317) 139 Gedney Cir, Bernice, LA 70481	<b>District of Columbia</b> (002) <b>Christian Acres Youth Center Inc.</b> (002003)	DOB: <b>2004-04-18</b> Gender: <b>Female</b> Grade:	 <div>Click Edit</div>
<b>Manual Match Type</b>			
Eligibility Type	Start Date	End Date	
<b>All Other Match Types</b>			
Eligibility Type	Identified Date	Match Source	Location Info
SNAP	08/06/2020	DM Person ID (State)	District of Columbia(002) Christian Acres Youth Center Inc. (002003)
TANF	06/03/2020	DM Person ID (State)	District of Columbia(002) Christian Acres Youth Center Inc. (002003)

The match result is displayed along with the other match types that have been assigned to this student. Click Edit.

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The match result is displayed along with the other match types that have been assigned to this student. Click Edit.

<b>Jazmin Rubio</b> (1007179317) 139 Gedney Cir, Bernice, LA 70481		<b>District of Columbia</b> (002) <b>Christian Acres Youth Center</b> <b>Inc.</b> (002003)		DOB: <b>2004-04-18</b> Gender: <b>Female</b> Grade:	
--	--	--	--	---	--

Manual Match Type			
Eligibility Type	Start Date	End Date	
<a href="#">+ Add A New Program</a>			
			<a href="#">Cancel</a> <a href="#">Update</a>

All Other Match Types			
Eligibility Type	Identified Date	Match Source	Location Info
SNAP	08/06/2020	DM Person ID (State)	District of Columbia(002) Christian Acres Youth (002003) Center Inc.

Click Add a New Program

Click Add a New Program.

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Click Add a New Program.



<b>Jazmin Rubio</b> (1007179317) 139 Gedney Cir, Bernice, LA 70481	<b>District of Columbia</b> (002) <b>Christian Acres Youth Center</b> <b>Inc.</b> (002003)	DOB: <b>2004-04-18</b> Gender: <b>Female</b> Grade:
--	--	---

Manual Match Type		
Eligibility Type	Start Date	End Date
<div> <input type="text"/> <div>             Even Start  <b>Homeless</b>              Migrant           </div> </div>	<input type="text" value="mm/dd/yyyy"/> <input type="calendar"/>	<input type="text" value="mm/dd/yyyy"/> <input type="calendar"/>
<input type="text" value="match reason"/>		

+ Add A New Program

[Cancel](#)
[Update](#)

Select the Manual Match Type, which is Homeless in this example. The Manual Match Eligibility Type list is based on the user's role. Not all users will have access to all Eligibility Types.

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Select the Manual Match Type, which is Homeless in this example. The Manual Match Eligibility Type list is based on the user's role. Not all users will have access to all Eligibility Types.

<b>azmin Rubio</b> (1007179317) 39 Gedney Cir, ernice, LA 70481	<b>District of Columbia</b> (002) <b>Christian Acres Youth Center</b> <b>Inc.</b> (002003)	DOB: <b>2004-04-18</b> Gender: <b>Female</b> Grade:
<b>Manual Match Type</b>		
Eligibility Type	Start Date	End Date
Homeless	05/28/2021	mm/dd/yyyy
Match Reason:	The student lost their apartment	
<a href="#">+ Add A New Program</a>		
<a href="#">Cancel</a>		<a href="#">Update</a>

The user must enter the start date and match reason. Click Update.

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The user must enter the start date and match reason. Click Update.

<b>Jazmin Rubio</b> (1007179317) 139 Gedney Cir, Bernice, LA 70481		<b>District of Columbia</b> (002) <b>Christian Acres Youth Center</b> <b>Inc.</b> (002003)		DOB: <b>2004-04-18</b> Gender: <b>Female</b> Grade:	
--	--	--	--	---	---

Manual Match Type		
Eligibility Type	Start Date	End Date
Homeless	05/28/2021	N/A
Match Reason: The student lost their apartment.		

All Other Match Types			
Eligibility Type	Identified Date	Match Source	Location Info
SNAP	08/06/2020	DM Person ID (State)	District of Columbia(002) Christian Acres Youth (002003) Center Inc.
TANF	06/03/2020	DM Person ID (State)	District of Columbia(002) Christian Acres Youth (002003)

The Manual Match, Homeless in this case, will display under the Manual Match Type. All other program matches will display below.

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The Manual Match, Homeless in this case, will display under the Manual Match Type. All other program matches will display below.



Match Options: Address

Match Options: Address

Match Options

PERSON

ADDRESS

Match Option

Person ID

Upload File

Individual Match

Manual Authorization

District

All Districts

Specific District

School

All Schools

Match Type

Reset

Match

Under Match Options, click Address.

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Under Match Options, click Address.

Match Options

PERSON

ADDRESS

CEP DC Extended Match

View and match household addresses for DC Extended.

05/18/2021

Last Run Date

DONE

Status

79

Matches Queued



















Click Run Now

Match Results

Run Now

Address matching compares addresses of student in Person ID to the addresses of students in the state programs such as SNAP. Additional students may be identified by matching the addresses if the students live in the same household. Under Match Options, click Address. Click Run Now.

Address matching compares addresses of students in Person ID to the addresses of students in the state programs such as SNAP. Additional students may be identified by matching the addresses if the students live in the same household. Under Match Options, click Address. Click Run Now.

Eligible Address  <b>40 Kass Rd</b>  <b>Youngsville, LA 70673</b>	Matched Address <b>40 Kasse Rd</b> <b>Youngsville, LA 70673</b>	 <b>98%</b> Match Score	<b>1</b> Students Potentially Eligible	  
Eligible Address  <b>79 W Post Rd</b>  <b>White Castle, LA 70481</b>	Matched Address <b>79 W New York Post Rd</b> <b>White Castle, LA 70481</b>	 <b>93%</b> Match Score	<b>1</b> Students Potentially Eligible	  
Eligible Address  <b>61 Rosewood Rd</b>  <b>Saline Village, LA 70576</b>	Matched Address <b>61 Rosewood Rd</b> <b>Robeline Village, LA 70576</b>	 <b>91%</b> Match Score	<b>1</b> Students Potentially Eligible	  

The address matching found three potential matches with match scores of 98, 93 and 91 respectively. Let's look at each of these examples.

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The address matching found three potential matches with match scores of 98, 93 and 91 respectively. Let's look at each of these examples.

Eligible Address

40 Kass Rd

Youngsville, LA 70673

Matched Address

40 Kasse Rd

Youngsville, LA 70673

98%

Match Score

1

Students Potentially Eligible

Matches all students below

☐
☒

Student(s) at Matched Address

Student Name	District	School	Grade	Gender	DOB	Actions
Joe Hughes 1001077997	District of Columbia (002)	Christian Acres Youth Center Inc. (002003)		Female	08/02/1991	<input type="checkbox"/> <input checked="" type="checkbox"/>

Matches only one student at a time

The eligible address is 40 Kass Rd and the matched address is 40 Kasse Rd with a different spelling. The city, state and zip are the same. This is most likely the same address. Users at the district level should be able to determine if this is the same address or not. Clicking the checkmarks will match one or all of the students as shown on the screen. Since the user has determined that this is the same address, click Match.

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The eligible address is 40 Kass Rd and the matched address is 40 Kasse Rd with a different spelling. The city, state and zip are the same. This is most likely the same address. Users at the district level should be able to determine if this is the same address or not. Clicking the checkmarks will match one or all of the students as shown on the screen. Since the user has determined that this is the same address, click Match.



Eligible Address

79 W Post Rd

White Castle, LA 70481

Matched Address

79 W New York Post Rd

White Castle, LA 70481

93%

Match Score

1

Students Potentially Eligible

⚠

⊘

✓

No Match for all students below

Student(s) at Matched Address

Student Name	District	School	Grade	Gender	DOB	Actions
Hadassah Cannizaro 6693762948	District Route To for Unknowns 2 (004)	Carencro Heights Elementary School (004011)		Female	09/10/1991	<div>⊘</div> <div>✓</div>

No Match for one student at a time

For the second example, the address 79 W Post Rd and 79 W New York Post Rd could be two different streets in the same town, White Castle, LA. After the users confirms that these addresses are distinct, the user should click No Match as shown on the screen.

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For the second example, the address 79 W Post Rd and 79 W New York Post Rd could be two different streets in the same town, White Castle, LA. After the users confirms that these addresses are distinct, the user should click No Match as shown on the screen.

Eligible Address

61 Rosewood Rd

Saline Village, LA 70576

Matched Address

61 Rosewood Rd

Robeline Village, LA 70576

91%

Match Score

1

Students Potentially Eligible

⬆

⊗

✓

Click Match for all students below

Student(s) at Matched Address

Student Name	District	School	Grade	Gender	DOB	Actions
Cyrus Ponce 1397038241	District of Columbia (002)	Christian Acres Youth Center Inc. (002003)		Male	04/18/2000	<div>⊗</div> <div>✓</div>

Click Match for one student at a time

For the final example, the address 61 Rosewood Rd is the same. The user needs to investigate Saline Village, LA versus Robeline Village, LA both with the same zip code. If the user determines that these addresses are a match, click match for all students or click match for each student listed.

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For the final example, the address 61 Rosewood Rd is the same. The user needs to investigate Saline Village, LA versus Robeline Village, LA both with the same zip code. If the user determines that these addresses are a match, click match for all students or click match for each student listed.



## Poll #5

Select the best answer on your screen.

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Let's take a look at a poll in the webinar. Just click on the best answer on your screen.



## Poll #5

What is the benefit to matching addresses?

Answers:

- Students may be declined admission to the school.
- Student may be identified for programs by living in the same household.
- Student may be required to move out of the district.
- All of the above.

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## Poll #5

What is the benefit to matching addresses?

Answers:

- Students may be declined admission to the school.
- Student may be identified for programs by living in the same household.
- Student may be required to move out of the district.
- All of the above.

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The logo for CEP Manager is a rectangular graphic. It features a dark purple header and footer bar. The central area is light gray with a pattern of overlapping, semi-transparent squares in various shades of purple and white. The text "CEP Manager" is centered in a dark purple, sans-serif font, flanked by two thin horizontal lines.

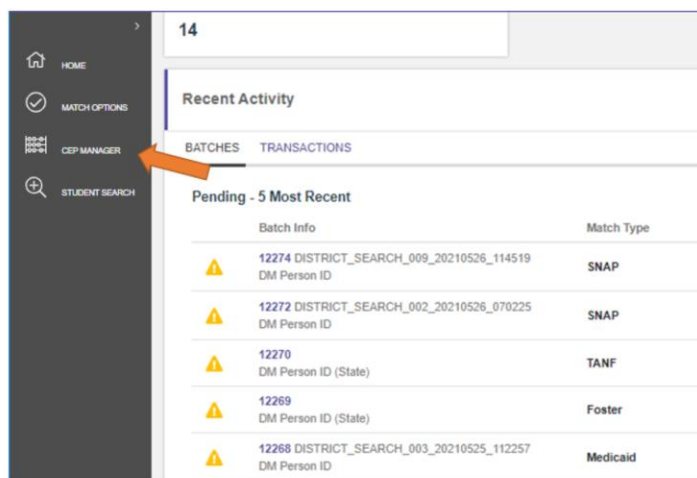
# CEP Manager

CEP Manager

# CEP Manager

The CEP Manager Icon is the abacus on the navigation panel.

- ✓ The icon will only appear if the user has rights to the CEP manager functions within Security Manager.
- ✓ CEP Manager allows the user to view, update and certify the Population and Election data.



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The CEP Manager Icon is the abacus on the navigation panel.

The icon will only appear if the user has rights to the CEP manager functions within Security Manager.

CEP Manager allows the user to view, update and certify the Population and Election data.

# CEP Manager

The CEP Manager Instructions are on the bottom of the CEP Manager Page.

## Instructions

1. The SFA must verify all fields and CEP data must be as of the date specified by the State.
2. To ensure up-to-date count of identified students, you should conduct one or more matches on Match Options page and resolve near matches as needed.
3. Once all data is verified, you must certify the information by checking the box next to the certification statement.
4. After certifying population data, you must click the "Submit" button.
5. Once the population data has been submitted and approved, you are ready to start CEP elections in Elections tab.
6. If you need to adjust your elections for schools, groupings, or district wide, please click on "Recalculate" and go to Recalculate Worksheet.
7. After adjusting your elections on Recalculate Worksheet, go back to Elections tab.
8. After certifying elections data, you must click the "Submit" button.

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The CEP Manager Instructions are on the bottom of the CEP Manager Page.



POPULATION

ELECTIONS

Group:  
Population Testing Group

6  
Total Identified

28  
Total Enrolled

21.43 ↓  
District ISP

Due 05/08  
Population Status

Due 06/30  
Election Status

2017 2018 2019 2020 2021

Location Summary

School Code	Location Name	Identified/Enrolled	ISP %	Approval Status	Action
34570	CEP Testing School	3/10	30.00	Pending	⌕ ✓ >>
5372	CEP Testing School - NE	0/0	0.00	Pending	⌕ ✓ >>
3298	CEP Testing School 1	2/5	40.00	Pending	⌕ ✓ >>
9555773	CEP Testing School 2	0/9	0.00	Pending	⌕ ✓ >>
75909	CEP Testing School 3	1/4	25.00	Pending	⌕ ✓ >>

☐ I certify the information entered for all schools in this application is correct and, if participating, will be used for CEP population data if applicable.

Submit & Certify Population

The population tab summary data displays the total identified, total enrolled, district trend, population status and election status due dates. The locations and the pending data are listed below the summary information. Click to see the data for the individual school. In this case, we selected school code 34570.

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The population tab data displays the total identified, total enrolled, district trend, population status and election status due dates. The locations and the pending data are listed below the summary information. Click to see the data for the individual school. In this case, we selected school code 34570 .

Population Details

Click Here

CEP Testing School (34570)

3 / 10  
Identified/Enrolled

30.00  
ISP

Pending  
Approval Status

Programs

Even Start	DC Extended	Foster	Homeless	Migrant	Medicaid	TANF	SNAP
0	0	0	0	0	0	0	3

Identified Students

School Code	Student ID	Even Start	DC Extended	Foster	Homeless	Migrant	Medicaid	TANF	SNAP	Count
34570	1000008078								▲	1
34570	1000042725								▲	1
34570	1000060611								▲	1

Legend

Eligibility Indicator

Eligible (ISP ≥ 40%)

Near Eligible (30% ≤ ISP < 40%)

Not Eligible (ISP < 30%)

Trend Indicator

Current Year ISP Goes Up

Current Year ISP Goes Down

Match Type Indicator

Manual Match

System Match

On this page the user can view the students by program and the Student ID number. The green triangle indicates a manual match, and a green circle indicates a system match. The user will verify the data on this page for each program and each school. Click to return to the previous page.

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On this page the user can view the students by program and the Student ID number. The green triangle indicates a manual match, and a green circle indicates a system match. The user will verify the data on this page for each program and each school. Click to return to the previous page.

POPULATION

ELECTIONS

Group:

Population Testing Group

6

Total Identified

28

Total Enrolled

21.43 ↓

District ISP

Due 05/08

Population Status

Due 06/30

Election Status

2017

2018

2019

2020

2021

Location Summary

School Code	Location Name	Identified/Enrolled	ISP %	Approval Status	Actions
34570	CEP Testing School	3/10	30.00	Pending	⌂ ✓ >>
5372	CEP Testing School - NE	0/0	0.00	Pending	⌂ ✓ >>
3298	CEP Testing School 1	2/5	40.00	Pending	⌂ ✓ >>
	CEP Testing School 2	0/9	0.00	Pending	⌂ ✓ >>
	CEP Testing School 3	1/4	25.00	Pending	⌂ ✓ >>

☐ I certify the information entered for all schools in this application is correct and, if participating, will be used for CEP population data if applicable.
 

Submit & Certify Population

Once the data has been reviewed, the user must submit and certify the population. Check the box next to the certification statement and click the Submit and Certify Population button.

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Once the data has been reviewed, the user must submit and certify the population. Check the box next to the certification statement and click the Submit and Certify Population button.

POPULATION

ELECTIONS

Group:

Population Testing Group

6

Total Identified

28

Total Enrolled

21.43 ↓

District ISP

Due 05/08

Population Status

Due 06/30

Election Status

2017

2018

2019

2020

2021

Location Summary

School Code	Location Name	Identified/Enrolled	ISP %	Approval Status	Actions
34570	CEP Testing School	3/10	30.00	Submitted	>>
5372	CEP Testing School - NE	0/0	0.00	Submitted	>>
3298	CEP Testing School 1	2/5	40.00	Submitted	>>
9555773	CEP Testing School 2	0/9	0.00	Submitted	>>
75909	CEP Testing School 3	1/4	25.00	Submitted	>>

☐ I certify the information entered for all schools in this application is correct and, if participating, will be used for CEP population data if applicable.
 

Submit & Certify Population

Once the data has been submitted, the state must approve the data submission.

Once the data has been submitted, the state must approve the data submission.

POPULATION

ELECTIONS

Click Here

Group:

Population Testing Group

6

Total Identified

28

Total Enrolled

21.43

District ISP

Approved

Population Status

Reopen

Election Status

2017

2018

2019

2020

2021

Location Summary

School Code	Location Name	Identified/Enrolled	ISP %	Approval Status	Actions
34570	CEP Testing School	3/10	30.00	Approved	⌚ ✓ ➡
5372	CEP Testing School - NE	0/0	0.00	Approved	⌚ ✓ ➡
3298	CEP Testing School 1	2/5	40.00	Approved	⌚ ✓ ➡
9555773	CEP Testing School 2	0/9	0.00	Approved	⌚ ✓ ➡
75909	CEP Testing School 3	1/4	25.00	Approved	⌚ ✓ ➡

1 - 5 of 5

Previous

1

Next

Once the state has approved the submission, the district will see the approved status indicator. Now let's click the Elections tab. The elections data is only available after the state approves the population.

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Once the state has approved the submission, the district will see the approved status indicator.

Now let's click the Elections tab. The elections data is only available after the state approves the population.

CEP MANAGER

POPULATION

ELECTIONS

Group:

Population Testing Group

9

Total Identified

29

Total Enrolled

31.03

District ISP

Approved

Population Status

Reopen

Election Status

2017

2018

2019

2020

2021

Elections

School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist.   New	Approval Status	Actions
--	Cluster 1	2022	3	9	20	45.00	72.00	Yes   Yes	Approved	Participating
5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No   --	Rejected	Not Participating
9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No   No	Approved	Not Participating

1 - 3 of 3

Previous

1

Next

Reopen Submission

On this page we can view the detailed elections data including the location name, the total identified, the total enrolled, the ISP, the Calculated ISP, the existing or new participation and the approval status. On the left of the screen, the user will see the eligibility indicators. Green indicators are eligible, yellow are near eligible and red indicators are not eligible.

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On this page we can view the detailed elections data including the location name, the total identified, the total enrolled, the ISP, the Calculated ISP, the existing or new participation and the approval status. On the left of the screen, the user will see the eligibility indicators. Green indicators are eligible, yellow are near eligible and red indicators are not eligible.

CEP MANAGER

POPULATION

ELECTIONS

Group:  
Population Testing Group

9  
Total Identified

29  
Total Enrolled

31.03  
District ISP

Approved  
Population Status

Reopen  
Election Status

20172018201920202021

Elections

School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist.   New	Approval Status	Actions
--	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes   Yes	Approved	Participating
5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No   --	Rejected	Not Participating
9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No   No	Approved	Not Participating

1 - 3 of 3

Previous1Next

Reopen Submission

The ISP is the proportion of students who are directly certified or categorically eligible for free school meals through means other than a school meal application and who are not subject to verification. To determine the Identified Student Percentage (ISP), SFAs and schools divide the number of identified students by the number of enrolled students, and then multiply by 100.

The ISP is the proportion of students who are directly certified or categorically eligible for free school meals through means other than a school meal application and who are not subject to verification. To determine the Identified Student Percentage (ISP), SFAs and schools divide the number of identified students by the number of enrolled students, and then multiply by 100.

CEP MANAGER

POPULATION

ELECTIONS

Group:

Population Testing Group

9

Total Identified

29

Total Enrolled

31.03

District ISP

Approved

Population Status

Reopen

Election Status

2017

2018

2019

2020

2021

Elections

School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist.   New	Approval Status	Actions
--	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes   Yes	Approved	Participating
5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No   --	Rejected	Not Participating
9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No   No	Approved	Not Participating

1 - 3 of 3

Previous

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Next

Reopen Submission

The Calculated ISP is used to determine the Federal reimbursement. The ISP multiplied by the CEP multiplier (currently 1.6) provides the Calculated ISP which is the percentage of meals claimed at the free rate.

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The Calculated ISP is used to determine the Federal reimbursement. The ISP multiplied by the CEP multiplier (currently 1.6) provides the Calculated ISP which is the percentage of meals claimed at the free rate.



CEP MANAGER

POPULATION

ELECTIONS

Group:  
Population Testing Group

9  
Total Identified

29  
Total Enrolled

31.03  
District ISP

Approved  
Population Status

Reopen  
Election Status

20172018201920202021

Elections

School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist.   New	Approval Status	Actions
--	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes   Yes	Approved	Participating
5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No   --	Rejected	Not Participating
9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No   No	Approved	Not Participating

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Reopen Submission

An SFA may participate in CEP for all schools in the SFA, or elect CEP in only a certain group of schools, depending on eligibility and financial considerations.

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An SFA may participate in CEP for all schools in the SFA, or elect CEP in only a certain group of schools, depending on eligibility and financial considerations.

CEP MANAGER

POPULATION

ELECTIONS

Group:

Population Testing Group

9

Total Identified

29

Total Enrolled

31.03

District ISP

Approved

Population Status

Reopen

Election Status

2017

2018

2019

2020

2021

Elections

Click Here

School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist.   New	Approval Status	Actions
--	Cluster 1	2022	3	9	20	45.00	72.00	Yes   Yes	Approved	Participating
5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No   --	Rejected	Not Participating
9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No   No	Approved	Not Participating

1 - 3 of 3

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Reopen Submission

Grouping or clustering is a flexible characteristic of CEP that may be used to maximize Federal reimbursements and administrative efficiencies. SFAs have discretion in how to cluster schools to optimize CEP benefits. Clustering (or multiple schools participating as a single CEP group) could allow some schools with an ISP below 40 percent to participate as long as the group ISP is at least 40 percent. Click the double arrow to drill in to see the data details.

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Grouping or clustering is a flexible characteristic of CEP that may be used to maximize Federal reimbursements and administrative efficiencies. SFAs have discretion in how to cluster schools to optimize CEP benefits. Clustering (or multiple schools participating as a single CEP group) could allow some schools with an ISP below 40 percent to participate as long as the group ISP is at least 40 percent. Click the double arrow to drill in to see the data details.

Cluster 1

2020

Base Year

2

Total Sites

6/11

Identified/Enrolled

54.55

ISP %

87.27

Calculated ISP %

Yes | Yes

Participation Exist | New

Approved

Approval Status

Sites

School Code ▾	Location Name ▾	Total Identified ▾	Total Enrolled ▾	ISP % ▾
3298	CEP Testing School 1	4	6	66.67
75909	CEP Testing School 3	2	5	40.00

Programs

Even Start	DC Extended	Foster	Homeless	Migrant	Medicaid	TANF	SNAP
0	0	2	0	1	0	2	1

Identified Students

School Code ▾	Student ID ▾	Even Start ▾	DC Extended ▾	Foster ▾	Homeless ▾	Migrant ▾	Medicaid ▾	TANF ▾	SNAP ▾	Count ▾
3298	1000042731			▲						1
3298	1000042732							▲		1
3298	1000042733							▲		1
3298	1000042734					●				1
75909	1000042746								▲	1
75909	1000277121			▲						1

Legend

Eligibility Indicator

■ Eligible

■ Near Eligible

■ Not Eligible

Trend Indicator

Match Type Indicator

On this screen, the user can view the election details by program, school and population. Again, a green triangle indicates a manual match, and a green circle indicates a system match. Programs must be enabled by the state to show up in CEP Manager so a program such as Medicaid that the state does not enable will not show up at the district or building level on this page.

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On this screen, the user can view the election details by program, school and population. Again, a green triangle indicates a manual match, and a green circle indicates a system match. Programs must be enabled by the state to show up in CEP Manager so a program such as Medicaid that the state does not enable will not show up at the district or building level on this page.

CEP MANAGER

POPULATION

ELECTIONS

Group:  
Population Testing Group

9  
Total Identified

29  
Total Enrolled

31.03  
District ISP

Approved  
Population Status

Reopen  
Election Status

20172018201920202021

Elections

Click Refresh

Recalculate

School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist.   New	Approval Status	Actions
Cluster 1	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes   Yes	Approved	Participating
5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No   --	Rejected	Not Participating
9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No   No	Approved	Not Participating

1 - 3 of 3

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Reopen Submission

The user can refresh the data if the data changes by clicking the refresh button.

The user can refresh the data if the data changes by clicking the refresh button.

CEP MANAGER

POPULATION

ELECTIONS

Group:  
Population Testing Group

9  
Total Identified

29  
Total Enrolled

31.03  
District ISP

Approved  
Population Status

Reopen  
Election Status

20172018201920202021

Elections

Click to Drill Into the Details

Recalculate

School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist.   New	Approval Status	
--	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes   Yes	Approved	Participating
5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No   --	Rejected	Not Participating
9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No   No	Approved	Not Participating

1 - 3 of 3

Previous1Next

Reopen Submission

The user can view the details for the Elections. Click the double arrow to drill into the details for Cluster 1.

The user can view the details for the Elections. Click the double arrow to drill into the details for Cluster 1.

Election Details

Cluster 1

2020  
Base Year

2  
Total Sites

6/11  
Identified/Enrolled

54.55  
ISP %

87.27  
Calculated ISP %

Yes | Yes  
Participation Exist | New

Approved  
Approval Status

Click Here

Sites

School Code	Location Name	Total Identified	Total Enrolled	ISP %
3298	CEP Testing School 1	4	6	66.67
75909	CEP Testing School 3	2	5	40.00

Programs

Even Start	DC Extended	Foster	Homeless	Migrant	Medicaid	TANF	SNAP
0	0	2	0	1	0	2	1

Identified Students

School Code	Student ID	Even Start	DC Extended	Foster	Homeless	Migrant	Medicaid	TANF	SNAP	Count
3298	1000042731			▲						1
3298	1000042732							▲		1
3298	1000042733							▲		1
3298	1000042734					●				1
75909	1000042746								▲	1
75909	1000277121			▲						1

The user can drill into the cluster to see the data details. On the left of the screen, the user will see the eligibility indicators. For the schools in the cluster, the Green indicators are eligible, yellow are near eligible and red indicators are not eligible. For the identified students, a green triangle is a manual match and a green circle is a system match.

Click the double arrow to return to the elections page.

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The user can drill into the cluster to see the data details. On the left of the screen, the user will see the eligibility indicators. For the schools in the cluster, the Green indicators are eligible, yellow are near eligible and red indicators are not eligible. For the identified students, a green triangle is a manual match and a green circle is a system match. Click the double arrow to return to the elections page.

CEP MANAGER

POPULATION

ELECTIONS

Group:  
Population Testing Group

9  
Total Identified

29  
Total Enrolled

31.03  
District ISP

Approved  
Population Status

Reopen  
Election Status

20172018201920202021

Elections

Click Recalculate

Recalculate

School Code	Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	Calculated ISP %	Participation Exist.   New	Approval Status	Actions
--	Cluster 1	2022	3	9	20	45.00 ↓	72.00	Yes   Yes	Approved	Participating ⌚ ✓ ➡
5372	CEP Testing School - NE	--	1	0	0	0.00	0.00	No   --	Rejected	Not Participating ⌚ ✓ ➡
9555773	CEP Testing School 2	--	1	0	9	0.00	0.00	No   No	Approved	Not Participating ⌚ ✓ ➡

1 - 3 of 3

Previous1Next

Reopen Submission

If the district needs to change the settings, they can click the recalculate button.

If the district needs to change the settings, they can click the recalculate button.

Group: Population Testing Group?

**754**  
Total Identified

**907**  
Total Enrolled

**83.13**  
District ISP

**Approved**  
Population Status

**Due 06/30**  
Election Status

2017 2018 2019 2020 2021

**Calculate Worksheet**

**Sites**

School Code	Location Name	Base Year	Total Identified	Total Enrolled	ISP %	Participation
018001	School Academy	2022	3	193	1.55	Participating
018002	High School	2022	6	232	2.59	1-Year-Renewal
018005	Elementary School	2022	9	401	2.24	Cluster 1
						Cluster 2
						Cluster 3
						Cluster 4

Legend

Eligibility Indicator

Eligible (ISP ≥ 40%)

Near Eligible (30% ≤ ISP < 40%)

Not Eligible (ISP < 30%)

Trend Indicator

Current Year ISP Goes Up

Current Year ISP Goes Down

**District Wide**

**Group Summary**

Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	1-Year-Renewal
Cluster 1	2022	1	9	401	2.24	Participating
Cluster 2	2022	1	3	193	1.55	1-Year-Renewal
Cluster 4	2022	1	6	232	2.59	Cluster 1

Return to Elections

If the ISP is high enough, the District Wide button will be available to select.

This recalculate page allows the user to indicate if they are going to go district wide and they would not have to do any site-by-site setup. If the ISP is high enough, the District Wide button will be available to select.

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This recalculate page allows the user to indicate if they are going to go district wide and they would not have to do any site-by-site setup.  
If the ISP is high enough, the District Wide button will be available to select.



Group:   
Population Testing Group2

754  
Total Identified

907  
Total Enrolled

83.13  
District ISP

Approved  
Population Status

Due 06/30  
Election Status

Calculate Worksheet

District Wide

School Code	Location Name	Base Year	Total Identified	Total Enrolled	ISP %	Participation
018001	School Academy	2022	3	193	1.55	Participating
018002	High School	2022	6	232	2.59	Participating
018005	Elementary School	2022	9	401	2.24	Participating

Eligibility Indicator

Eligible (ISP ≥ 40%)

Near Eligible (30% ≤ ISP < 40%)

Not Eligible (ISP < 30%)

Trend Indicator

Current Year ISP Goes Up

Current Year ISP Goes Down

Group Summary

Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	1-Year-Renewal
Cluster 1	2022	1	9	401	2.24	<input type="checkbox"/>
Cluster 2	2022	1	3	193	1.55	<input type="checkbox"/>
Cluster 4	2022	1	6	232	2.59	<input type="checkbox"/>

Return to Elections

Participating and Non-Participating only apply to schools operating CEP by themselves.

The district can also set up the site-by-site participation and the clusters can be assigned on this page. Participating and Not Participating choices only apply to schools operating CEP by themselves.

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The district can also set up the site-by-site participation and the clusters can be assigned on this page. Participating and Not Participating choices only apply to schools operating CEP by themselves.

Group:
Population Testing Group2

754  
Total Identified

907  
Total Enrolled

83.13  
District ISP

Approved  
Population Status

Due 06/30  
Election Status

2017 2018 2019 2020 2021

Calculate Worksheet
District Wide

School Code	Location Name	Base Year	Total Identified	Total Enrolled	ISP %	Participation
018001	School Academy	2022	3	193	1.55	<div> Participating 1-Year Renewal Cluster 1 Cluster 2 Cluster 3 Cluster 4 Participating Not Participating </div>
018002	High School	2022	6	232	2.59	
018005	Elementary School	2022	9	401	2.24	

Location Name	Base Year	Total Sites	Total Identified	Total Enrolled	ISP %	1-Year Renewal
Cluster 1	2022	1	9	401	2.24	<div> 1-Year Renewal </div>
Cluster 2	2022	1	3	193	1.55	<div> 1-Year Renewal </div>
Cluster 4	2022	1	6	232	2.59	<div> 1-Year Renewal </div>

Return to Elections

Eligibility Indicator

Eligible (ISP ≥ 40%)

Near Eligible (30% ≤ ISP < 40%)

Not Eligible (ISP < 30%)

Trend Indicator

Current Year ISP Goes Up

Current Year ISP Goes Down

When choosing clusters, choose Cluster 1 first, followed by Cluster 2, 3 and 4 sequentially. Do not skip a cluster number in the sequence.

The clusters can be assigned on this page. When choosing clusters, choose Cluster 1 first, followed by Cluster 2, 3 and 4 sequentially. Do not skip a cluster number in the sequence.

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The clusters can be assigned on this page. When choosing clusters, choose Cluster 1 first, followed by Cluster 2, 3 and 4 sequentially. Do not skip a cluster number in the sequence.



## Poll #6

Select the best answer on your screen.

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Let's take a look at a poll in the webinar. Just click on the best answer on your screen.



## Poll #6

Who can view the CEP Manager data?

Answers:

- All users regardless of role.
- Only those with rights to CEP Manager.
- Only system administrators.
- All of the above.

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Who can view the CEP Manager data?

Answers:

- All users regardless of role.
- Only those with rights to CEP Manager.
- Only system administrators.
- All of the above.



## Poll #6

Who can view the CEP Manager data?

Answers:

- All users regardless of role
- Only those with rights to CEP Manager
- Only system administrators
- All of the above

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Who can view the CEP Manager data?

Answers:

- All users regardless of role
- **Only those with rights to CEP Manager**
- Only system administrators
- All of the above

# System Features and Wrap Up

System Features and Wrap Up



## Student Search

Student Search

# Student Search

- ✓ Click Student Search or the magnifying glass on the navigation panel.

Batch Info	Match Type
12274 DISTRICT_SEARCH_009_20210526_114519 DM Person ID	SNAP
12272 DISTRICT_SEARCH_002_20210526_070225 DM Person ID	SNAP
12270 DM Person ID (State)	TANF
12269 DM Person ID (State)	Foster
12268 DISTRICT_SEARCH_003_20210525_112257 DM Person ID	Medicaid

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Click Student Search or the magnifying glass on the navigation panel.



The screenshot shows a web application interface for searching student records. It is divided into two main sections: 'Search Options' and 'Search Results'.

**Search Options:** This section contains five input fields arranged horizontally:

- Identifier :** A text input field containing the value '1007179317'.
- Match Type :** A dropdown menu with 'TANF' selected.
- District :** A dropdown menu.
- School :** A dropdown menu.
- School Year :** A dropdown menu with '2022' selected.

To the right of these fields are two buttons: a 'Reset' button and a 'Search' button. An orange callout box with the text 'Click Search' points to the 'Search' button.

**Search Results:** This section features a table with the following headers: State ID, Name, DOB, Gender, Grade, Location Info, ID Info, Eligibility Types, Earliest Identified Date, and Actions. The table body is currently empty.

Type in the student's Secure ID, select the match type, in this case TANF and click Search.

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Type in the student's Secure ID, select the match type, in this case TANF and click Search.

Search Options

Identifier :

1007179317

Match Type :

TANF

District :

School :

School Year :

2022

Reset

Search

Search Results

State ID

Name

DOB

Gender

Grade

Location Info

ID Info

Eligibility Types

Earliest Identified Date

Actions

1007179317

Rubio, Jazmin

04/18/2004

Female

District of Columbia (002)  
Christian Acres Youth Center Inc. (002003)

SS

Foster

TANF

SNAP

05/09/2021

>>

1 - 1 of 1

Previous

1

Next

The system returned the student along with her eligibility types.

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The system returned the student along with her eligibility types.

The screenshot displays the 'eScholar One-Id DirectMatch' search interface. The top navigation bar includes 'Home' and 'Search Options'. The search form contains the following fields:

- Identifier: (empty text input)
- Match Type: (dropdown menu showing 'SNAP')
- District: (dropdown menu showing 'District of Columbia (002)')
- School: (empty text input)
- School Year: (dropdown menu showing '2022')

Buttons for 'Reset' and 'Search' are located to the right of the form. An orange callout box with the text 'Click Search' points to the 'Search' button. Below the form, the 'Search Results' section displays a warning message: 'Match Type must be entered to view results.'

“My Students” from Version 11 has been replaced with a simple student search feature. To download all students in a program, regardless of batch, choose Search, do not enter a State ID number, select the Match Type, the district is selected based on your user role, select the Year and click Search.

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“My Students” from Version 11 has been replaced with a simple student search feature. To download all students in a program, regardless of batch, choose Search, do not enter a State ID number, select the Match Type, the district is selected based on your user role, select the Year and click Search.

Identifier :

Match Type :

SNAP

District :

District of Columbia (002)

School :

School Year :

2022

Reset

Search

Click Download

Search Results

State ID	Name *	DOB	Gender	Grade	Location Info	ID Info	Eligibility Types	Earliest Identified Date	Actions
1019207566	Abbott, Amara	02/18/2002	Female		District of Columbia (002) Christian Acres Youth Center Inc. (002003)	SS	Foster TANF SNAP	05/09/2021	>>
1080529608	Abbott, Hamson	07/19/1986	Male		District of Columbia (002) Christian Acres Youth Center Inc. (002003)	SS	SNAP TANF	05/09/2021	>>
1036518892	Abbott, Nicholas	12/26/1985	Male		District of Columbia (002) Christian Acres Youth Center Inc. (002003)	SS	TANF SNAP	05/09/2021	>>
1004218591	Abbott, Wade	12/16/1986	Male		District of Columbia (002) Christian Acres Youth Center Inc. (002003)	SS	SNAP TANF	05/09/2021	>>
1019078103	Abercrombie, Donovan	12/24/1995	Male		District of Columbia (002) Christian Acres Youth Center Inc. (002003)	SS	TANF SNAP	05/09/2021	>>
1024546209	Abreu, Christian	01/27/1992	Male		District of Columbia (002) Christian Acres Youth Center Inc. (002003)	SS	SNAP TANF	05/09/2021	>>

The list of all students in the program will be displayed. Click the download icon in the upper right of the search results panel.

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The list of all students in the program will be displayed. Click the download icon in the upper right of the search results panel.



## State Batches

State Batches

# District Batches vs. State Batches

## District Batches:

District batches match the district student records against the state program records such as SNAP, TANF, etc. The district batches contain a smaller record count than the state program record files such as SNAP or TANF.

## State Batches:

In a State Batch, the Match Type or Program data file such as SNAP or TANF contains a much smaller record count when compared to the State Batch file which contains all Person ID records for the entire state. In other words, the Match Type or Program file such as SNAP contains a subset of the State Batch records. The system will process the records much faster when comparing the smaller file against the larger record file. The results of the State Batch will contain all TANF (or Program) records and the match, near match or no match records from the Person ID records for the entire state.

Completed - 5 Most Recent

Batch Info	Match Type	Location Info
12581 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)
12576 THEV3FILE_NEW.txt File	SNAP	District of Columbia (002) Christian Acres Youth Center Inc. (002003)
12573 THEV3FILE_NEW.txt File	Foster	District of Columbia (002) Christian Acres Youth Center Inc. (002003)
12559 DM Person ID (State)	TANF	State Batch
12503 DM Person ID (State)	Foster	State Batch

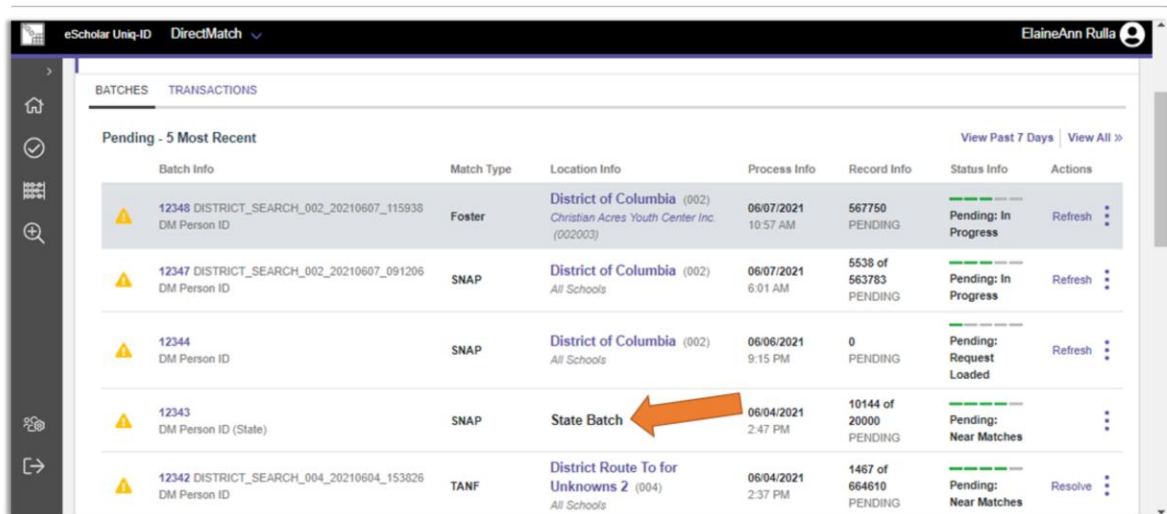
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## District Batches:

District batches match the district student records against the state program records such as SNAP, TANF, etc. The district batches contain a smaller record count than the state program record files such as SNAP or TANF.

## State Batches:

In a State Batch, the Match Type or Program data file such as SNAP or TANF contains a much smaller record count when compared to the State Batch file which contains all Person ID records for the entire state. In other words, the Match Type or Program file such as SNAP contains a subset of the State Batch records. The system will process the records much faster when comparing the smaller file against the larger record file. The results of the State Batch will contain all TANF (or Program) records and the match, near match or no match records from the Person ID records for the entire state.



The screenshot shows the 'eScholar Uniq-ID DirectMatch' interface. The user 'ElaineAnn Rulla' is logged in. The 'BATCHES' tab is selected, showing a list of 'Pending - 5 Most Recent' batches. The table has columns for Batch Info, Match Type, Location Info, Process Info, Record Info, Status Info, and Actions. An orange arrow points to the 'State Batch' entry in the Location Info field of the fourth row.

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
12348 DISTRICT_SEARCH_002_20210607_115938 DM Person ID	Foster	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	06/07/2021 10:57 AM	567750 PENDING	Pending: In Progress	Refresh
12347 DISTRICT_SEARCH_002_20210607_091206 DM Person ID	SNAP	District of Columbia (002) All Schools	06/07/2021 6:01 AM	5538 of 563783 PENDING	Pending: In Progress	Refresh
12344 DM Person ID	SNAP	District of Columbia (002) All Schools	06/06/2021 9:15 PM	0 PENDING	Pending: Request Loaded	Refresh
12343 DM Person ID (State)	SNAP	State Batch	06/04/2021 2:47 PM	10144 of 20000 PENDING	Pending: Near Matches	
12342 DISTRICT_SEARCH_004_20210604_153826 DM Person ID	TANF	District Route To for Unknowns 2 (004) All Schools	06/04/2021 2:37 PM	1467 of 664610 PENDING	Pending: Near Matches	Resolve

State Batches are identified with the term State Batch in the Location Info field.

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State Batches are identified with the term State Batch in the Location Info field.

Next Steps: Review Near Matches Below

Submission Records Near Matches

Filter Options

Transaction ID : Batch ID : 12343 Submission Type : Match Type :

District : School : School Year :

Reset Filter Data

Pending Near Matches

STATE BATCH	Program Record <b>DANIELLE IRWIN</b>	DOB: 03/27/2004 Grade: - Client Index ID: 512345936	Race: Male Gender: Male SSN: -	94% Max Match Score	1 Potential Matches	▼ ⌕ >>
STATE BATCH	Program Record <b>MADALYN COBB</b>	DOB: 06/05/1995 Grade: - Client Index ID: 512351647	Race: Male Gender: Male SSN: -	94% Max Match Score	1 Potential Matches	▼ ⌕ >>
STATE BATCH	Program Record	DOB: 12/08/1987	Race: Male	Max	Potential	

State batch near matches are identified with the state picture on the left side of the screen.  
The near match resolution works the same way as district matches.

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State batch near matches are identified with the state picture on the left side of the screen.  
The near match resolution works the same way as district matches.



**NEAR MATCHES FOUND:**

The system found Near Matches which should be reviewed and resolved by a user.  
 Next Steps: Review Near Matches below

7151

Submission Records

7198

Near Matches

Filter Options

Transaction ID :

Batch ID :

Submission Type :

Match Type :

District :

School :

School Year :

Reset

Filter Data

Pending Near Matches

STATE BATCH

Program Record  
**DANIELLE IRWIN**

DOB: 03/27/2004  
 Grade: -  
 Client Index ID: 512345936

Race: Male  
 Gender: -  
 SSN: -

94%

Max Match Score

1

Potential Matches

⬆

⌛

⬆

Potential Matches to Person ID

When viewing State Batch results, the district user will only see records for students in their district.

When viewing State Batch results, the district user will only see records for students in their district.

**NEAR MATCHES FOUND:**

The system found Near Matches which should be reviewed and resolved by a user.  
 Next Steps: Review Near Matches below

7151

Submission Records

7198

Near Matches

Transaction ID :

Batch ID :

Submission Type :

Match Type :

District :

School :

School Year :

Filter Options

Reset

Filter Data

Pending Near Matches

STATE BATCH

Program Record  
**DANIELLE IRWIN**

DOB: 03/27/2004  
 Grade: -  
 Client Index ID: 512345936

Race: Male  
 Gender: -  
 SSN: -

94%

Max Match Score

1

Potential Matches

Click Here to Match the record

Potential Matches to Person ID

Person Name	Location	DOB	Grade	Local ID	Race	Gender	SSN	Match Score	
<div><div></div></div> Danielle Irwin 1001056698	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	03/27/2004				Female		<div>94%</div>	<div>✓</div> <div>»</div>

The user can select the check mark to match the record or select the double arrow to see more information.

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The user can select the check mark to match the record or select the double arrow to see more information.

**NEAR MATCHES FOUND:**

The system found Near Matches which should be reviewed and resolved by a user.  
**Next Steps: Review Near Matches below**

7151

Submission Records

7198

Near Matches

Filter Options

Transaction ID :

Batch ID :

Submission Type :

Match Type :

District :

School :

School Year :

Pending Near Matches

STATE BATCH

Program Record  
**DANIELLE IRWIN**

DOB: **03/27/2004**  
 Grade: -  
 Client Index ID: **512345936**

Race: **Male**  
 Gender: -  
 SSN: -

94%

Max Match Score

1

Potential Matches

Potential Matches to Person ID

Person Name	Location	DOB	Grade	Local ID	Race	Gender	SSN	Match Score	Actions
<b>Danielle Irwin</b> 1001056698	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	03/27/2004				Female		<div>94%</div>	

Click Here to see more information

Click the double arrow to see more information.

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Click the double arrow to see more information.

151

SUBMISSION RECORD

Source: SNAP

NEAR MATCH RECORD

Source: DM Person ID (State)

94%

Match Score

Match:ID 1001056698

Click Match: ID1001056698

Cancel Submission Record

No Match

Click Cancel

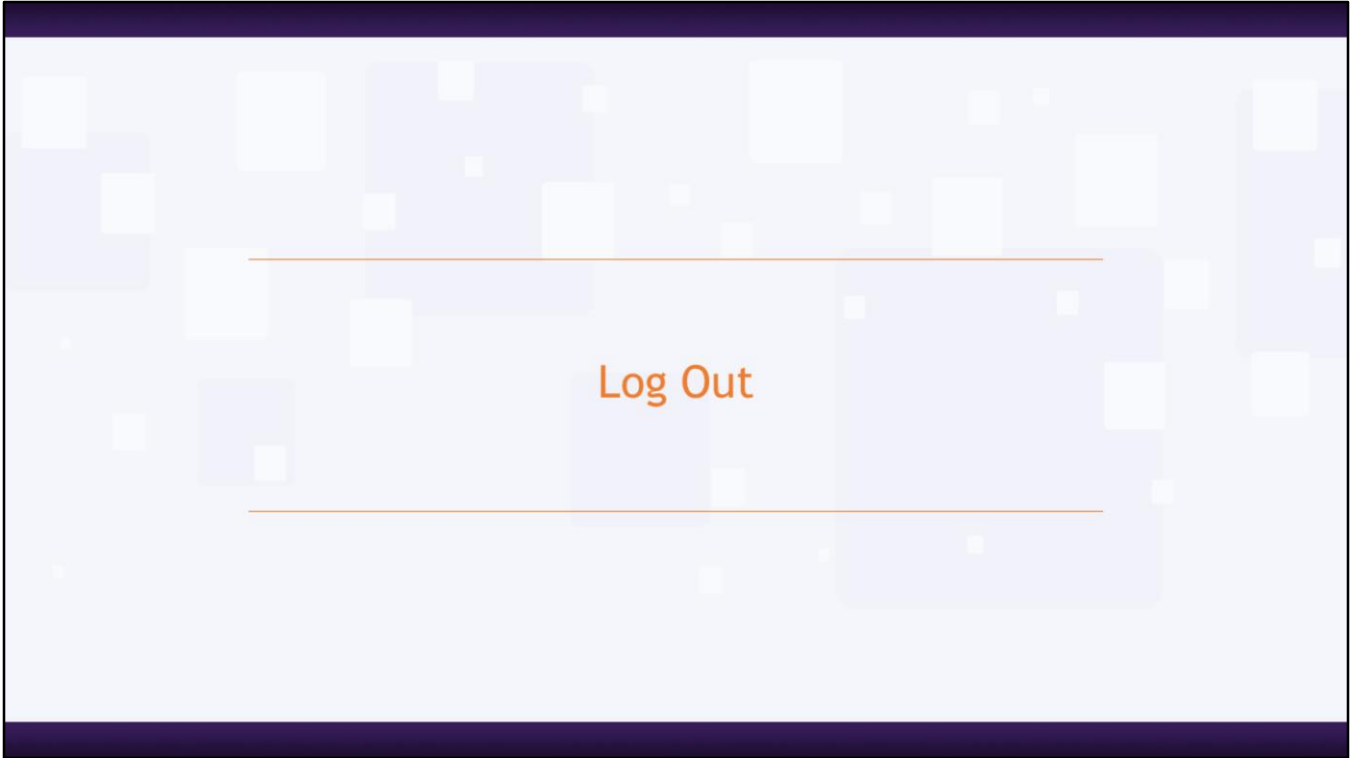
Click No Match

Matching Fields	
First Name	DANIELLE
Middle Name	
Last Name	IRWIN
Suffix Name	

At the top of the screen, we can see that we are matching the SNAP record against the DM Person ID State Record. After reviewing the near match information, the user can click Match, Cancel or No Match. Since this is the same student, click Match.

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At the top of the screen, we can see that we are matching the SNAP record against the DM Person ID State Record. After reviewing the near match information, the user can click Match, Cancel or No Match. Since this is the same student, click Match.



Log Out

Home

Pending Work

Population Status

Due 5/1

Election Status

Due 6/30

District Summary

Schools

135

Recent Activity

BATCHES

TRANSACTIONS

Pending - 5 Most Recent

View Past 7 Days

View All >>

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
<div>12347 DISTRICT_SEARCH_002_20210607_091206</div> <div>DM Person ID</div>	SNAP	<div>District of Columbia (002)</div> <div>All Schools</div>	<div>06/07/2021</div> <div>6:01 AM</div>	<div>5538 of 563783</div> <div>PENDING</div>	<div>Pending: In Progress</div>	<div>Refresh</div>
<div>12344</div> <div>DM Person ID</div>	SNAP	<div>District of Columbia (002)</div> <div>All Schools</div>	<div>06/06/2021</div> <div>9:15 PM</div>	<div>0</div> <div>PENDING</div>	<div>Pending: Request Loaded</div>	<div>Refresh</div>
<div>12343</div> <div>DM Person ID (State)</div>	SNAP	<div>State Batch</div>	<div>06/04/2021</div> <div>2:47 PM</div>	<div>10144 of 20000</div> <div>PENDING</div>	<div>Pending: Near Matches</div>	<div></div>
<div>12342 DISTRICT_SEARCH_004_20210604_153626</div> <div>DM Person ID</div>	TANF	<div>District Route To for Unknowns 2</div> <div>(004)</div> <div>All Schools</div>	<div>06/04/2021</div> <div>2:37 PM</div>	<div>1467 of 664610</div> <div>PENDING</div>	<div>Pending: Near Matches</div>	<div>Resolve</div>
<div>SEARCH_EXTRACT_20210604124907979.CSV</div> <div>File</div>	TANF	<div>District Route To for Unknowns 2</div> <div>(004)</div> <div>All Schools</div>	<div>06/04/2021</div> <div>12:09 PM</div>	<div>1 of 181</div> <div>PENDING</div>	<div>Pending: Near Matches</div>	<div>Resolve</div>

The user should always log out of the system when not actively using it. Do not ask the browser to save your username and password. There are two ways to log out. The first method is at the bottom of the navigation screen.

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The user should always log out of the system when not actively using it. Do not ask the browser to save your username and password. There are two ways to log out. The first method is at the bottom of the navigation screen.

The screenshot shows the eScholar DirectMatch web application. At the top right, the user's name "ElaineAnn Rulla" is displayed next to a profile icon, with an orange arrow pointing to it. The main content area includes a "Pending Work" section with "Due 5/1" and "Due 6/30", a "District Summary" showing "135" schools, and a "Recent Activity" section. The "Recent Activity" section has tabs for "BATCHES" and "TRANSACTIONS". Below these tabs is a table titled "Pending - 5 Most Recent" with columns for Batch Info, Match Type, Location Info, Process Info, Record Info, Status Info, and Actions. The table contains two rows of data, both with a yellow warning icon in the Batch Info column.

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
12348 DISTRICT_SEARCH_002_20210607_115938 DM Person ID	Foster	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	06/07/2021 10:57 AM	567750 PENDING	Pending: In Progress	Refresh
12347 DISTRICT_SEARCH_002_20210607_091206 DM Person ID	SNAP	District of Columbia (002) All Schools	06/07/2021 6:01 AM	5538 of 563783 PENDING	Pending: In Progress	Refresh

The second method is located under the username in the upper right corner.  
Either way will work just fine.

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The second method is located under the username in the upper right corner.  
Either way will work just fine.

The screenshot shows the eScholar Uniq-ID DirectMatch application interface. At the top right, the user's name 'ElaineAnn Rulla' is displayed next to a profile icon. Below the name, the email 'elainerulla@gmail.com' and phone number '9032671903' are listed. A dropdown menu is open, showing a 'Sign Out' button with an arrow icon, which is highlighted by an orange arrow from the main content area. The main content area includes a 'Pending Work' section with 'Due 5/1' and 'Due 6/30', a 'District Summary' showing '135' schools, and a 'Recent Activity' section with a table of pending transactions.

Batch Info	Match Type	Location Info	Process Info	Record Info	Status Info	Actions
12348 DISTRICT_SEARCH_002_20210607_115938 DM Person ID	Foster	District of Columbia (002) Christian Acres Youth Center Inc. (002003)	06/07/2021 10:57 AM	567750 PENDING	Pending: In Progress	Refresh
12347 DISTRICT_SEARCH_002_20210607_091206 DM Person ID	SNAP	District of Columbia (002) All Schools	06/07/2021 6:01 AM	5538 of 563783 PENDING	Pending: In Progress	Refresh

Click sign out.  
The user will be returned to the blank login screen.

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Click sign out.  
The user will be returned to the blank login screen.



# Review

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## **Today we discussed:**

- ✓The matching logic used in the DirectMatch System
- ✓How to make a good match decision
- ✓The process for downloading Match Records

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## Review

### **Today we discussed:**

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Contact eScholar Support at  
[support@escholar.com](mailto:support@escholar.com)

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To access the Louisiana DirectMatch system, check your email for an invitation from eScholar to create your account. Be sure to check your Junk mail or Clutter. If you still have issues with access to the system, contact support at [support@escholar.com](mailto:support@escholar.com).



Any Questions

# Thank you for your time!

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Thank you for your time.